

<b>AMENDMENT OF SOLICITATION/MODIFICATION OF CONTRACT</b>				1. CONTRACT ID CODE <b>S</b>		PAGE OF PAGES <b>1   67</b>	
2. AMENDMENT/MODIFICATION NO. <b>0003</b>		3. EFFECTIVE DATE <b>28-Aug-2017</b>		4. REQUISITION/PURCHASE REQ. NO.		5. PROJECT NO.(If applicable)	
6. ISSUED BY DHA CONTRACTING OFFICE-(CO-NCR) HT0014 8111 GATEHOUSE ROAD 2ND FLOOR FALLS CHURCH VA 22042		CODE <b>HT0014</b>		7. ADMINISTERED BY (If other than item 6)  <b>See Item 6</b>		CODE	
8. NAME AND ADDRESS OF CONTRACTOR (No., Street, County, State and Zip Code)				X		9A. AMENDMENT OF SOLICITATION NO. <b>HT0014-17-R-0010</b>	
				X		9B. DATED (SEE ITEM 11) <b>18-Jul-2017</b>	
						10A. MOD. OF CONTRACT/ORDER NO.	
						10B. DATED (SEE ITEM 13)	
CODE		FACILITY CODE					
<b>11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS</b>							
<input checked="" type="checkbox"/> The above numbered solicitation is amended as set forth in Item 14. The hour and date specified for receipt of Offer <input checked="" type="checkbox"/> is extended, <input type="checkbox"/> is not extended. Offer must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended by one of the following methods: (a) By completing Items 8 and 15, and returning <u>1</u> copies of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) By separate letter or telegram which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDGMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment you desire to change an offer already submitted, such change may be made by telegram or letter, provided each telegram or letter makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.							
12. ACCOUNTING AND APPROPRIATION DATA (If required)							
<b>13. THIS ITEM APPLIES ONLY TO MODIFICATIONS OF CONTRACTS/ORDERS.</b> <b>IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.</b>							
A. THIS CHANGE ORDER IS ISSUED PURSUANT TO: (Specify authority) THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NO. IN ITEM 10A.							
B. THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES (such as changes in paying office, appropriation date, etc.) SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(B).							
C. THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF:							
D. OTHER (Specify type of modification and authority)							
E. IMPORTANT: Contractor <input type="checkbox"/> is not, <input type="checkbox"/> is required to sign this document and return _____ copies to the issuing office.							
14. DESCRIPTION OF AMENDMENT/MODIFICATION (Organized by UCF section headings, including solicitation/contract subject matter where feasible.)  The purpose of this amendment is to: 1. Update DHA MSS Instructions Attachments 2 and 3. 2. Update Addendum to FAR 52.212-1 and Addendum to FAR 52.212-2. 3. Extend the required response date/time from 31-Aug-2017 01:00 PM to 07-Sep-2017 01:00 PM. 4. See Summary of Changes. 5. All other provisions, terms and conditions remain unchanged.							
Except as provided herein, all terms and conditions of the document referenced in Item 9A or 10A, as heretofore changed, remains unchanged and in full force and effect.							
15A. NAME AND TITLE OF SIGNER (Type or print)				16A. NAME AND TITLE OF CONTRACTING OFFICER (Type or print)			
				TEL: _____ EMAIL: _____			
15B. CONTRACTOR/OFFEROR		15C. DATE SIGNED		16B. UNITED STATES OF AMERICA		16C. DATE SIGNED	
_____ (Signature of person authorized to sign)				BY _____ (Signature of Contracting Officer)		28-Aug-2017	

## SECTION SF 30 BLOCK 14 CONTINUATION PAGE

**SUMMARY OF CHANGES**

## SECTION SF 1449 - CONTINUATION SHEET

## SOLICITATION/CONTRACT FORM

The required response date/time has changed from 31-Aug-2017 01:00 PM to 07-Sep-2017 01:00 PM.

The following have been modified:

ADDENDUM TO FAR 52.212-2

**1. SOURCE SELECTION**

1.1 **Basis for Contract Awards:** The best value approach is neither based on the Lowest Price Technically Acceptable (LPTA) nor Tradeoffs. Rather, the Government seeks to award to the offerors with the highest self-scored, Government validated, technical score with no less than Satisfactory (or Neutral) confidence performance assessment and with reasonable prices.

1.2 The Government will make a best value decision using a 4-Step evaluation process that includes responsiveness (submission and administrative requirements), technical capability, past performance and price (see Figure 1). The Government may conduct evaluations on all four steps either concurrently or sequentially.

1.3 The Government may determine that the number of proposals exceeds the number at which an efficient source selection can be conducted. For the purpose of efficiency, the Government may establish a competitive range comprised of the most highly rated proposals based on the evaluation criteria, as stated in FAR 15.306(c).

1.4 **Discussions:** The Government reserves the right to conduct discussions. If, during the evaluation period, it is determined to be in the best interest of the Government to hold discussions, offeror responses to Evaluation Notices (ENs) and the Final Proposal Revision (FPR) will be considered in making the source selection decision.

1.5 **Number of Contracts to be Awarded:** The Government plans on awarding approximately twenty (20) Indefinite Delivery/Indefinite Quantity (ID/IQ) contracts for the MSS Program. However, the Government reserves the right to award more, fewer or no contracts.

**2. EVALUATION**

2.1 The government will complete a 4-step evaluation process for each proposal received as illustrated below.



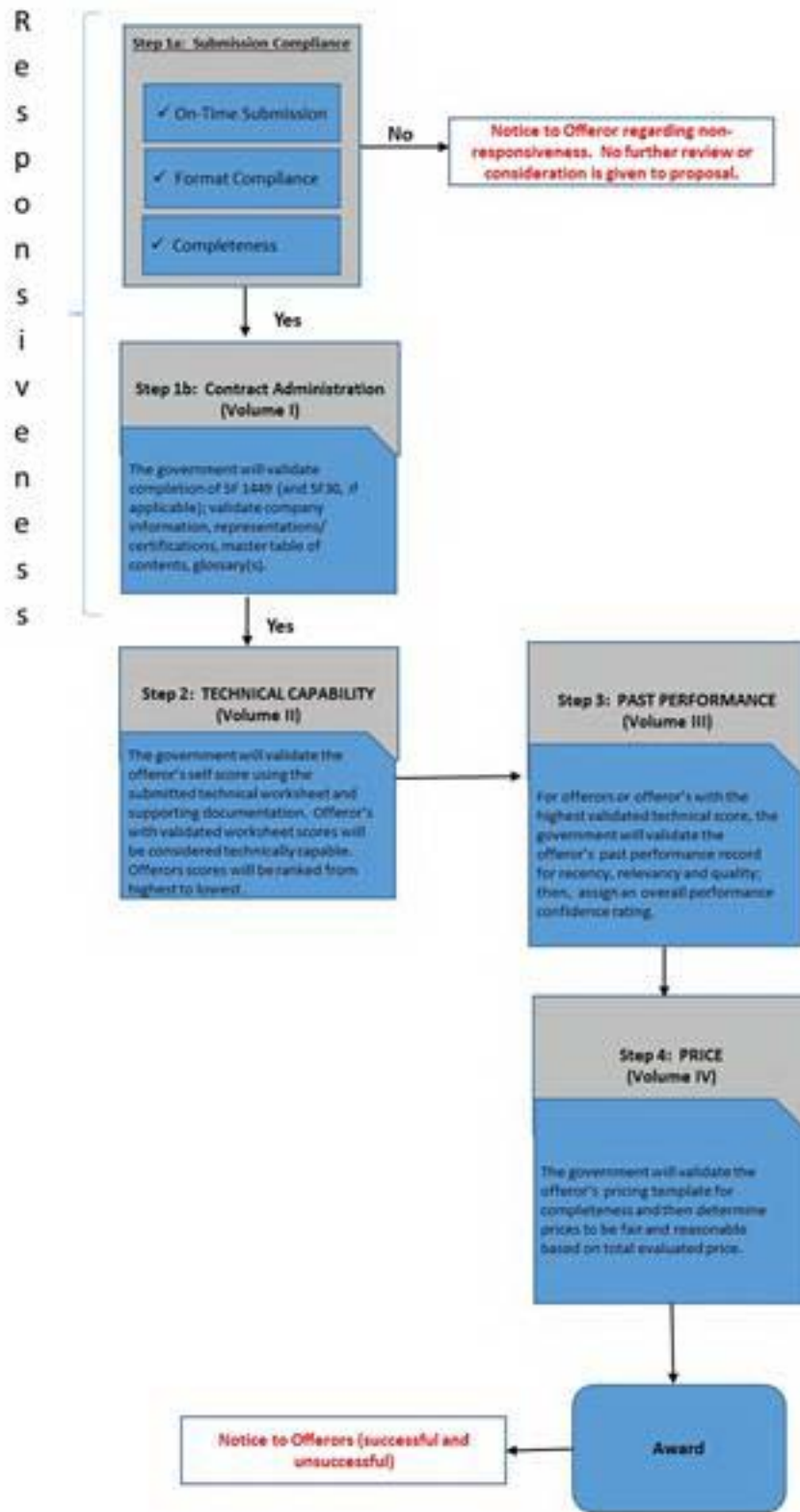


Figure 1: MSS Evaluation Process

2.1.1. Submission Compliance. The government will complete an initial review of the offeror's proposal to ensure adherence to proposal submission instructions in 52.212-1. Step 1a of the evaluation process titled "Submission Compliance" will ensure the proposal complies with all prescribed requirements which includes the timeliness of proposal submission, format compliance, and completeness of each volume. The government will consider an offeror ineligible for award if the proposal was not submitted by the required date and time, it is incomplete (missing items, signatures, etc.), or does not comply with format requirements. The Government may stop evaluation of the proposal if that occurs on an offeror's proposal.

2.1.1.1. Volume I, Contract Administration. Additionally, in Step 1b, the government will evaluate Volume I, Contract Administration, to ensure completion of the required SF 1449 and applicable SF 30(s) as well as ensure the offeror provided the required information in that volume.

2.1.2. Volume II, Technical Capability. In Step 2, the government will validate each offeror's claim of technical capability using the government-provided template "Technical Self-Scoring Worksheet" (Attachment 2) and their submitted supporting documentation provided in Volume II. The government will only use the supporting documentation provided by the offeror in this volume to confirm the claimed capability and point value assignment. Any claimed capability that does not have support documentation will not be considered "valid" by the government. Any task orders, Federal Supply Schedule (FSS) contracts, GSA orders, or blanket purchase agreements consolidated into a single claimed capability will be considered not "valid". Additionally, any supporting documentation that was not performed within five (5) years of the solicitation issue date, fails to match or lacks adequate details for the claimed technical capability or missing supporting documentation may be considered not "valid". Any supporting documentation not related to the services of this solicitation may be considered not "valid" with the exception of "Other" under Scope. If the government cannot validate a claimed capability based on the volume provided by the offeror, the government may deem the technical capability of the offeror to be unacceptable; discontinue evaluation efforts for the offeror's proposal and deem the offeror ineligible for award. However, if the Government enters into discussions, offeror(s) may be given an opportunity to address the issue and /or revise their technical score (i.e., recalculating the total points given for technical capability and/or provide additional supporting documentation); thus, offerors may be considered for award. The technical evaluation disposition will be at the discretion of the Government. The government reserves the right to enter into discussions with all or only the offerors' with the highest claimed technical scores. Those offerors whose claimed items on the technical worksheet are fully validated will continue to Step 3, Past Performance, either concurrently or sequentially.

2.1.3. Volume III, Past Performance. If proposals are evaluated sequentially, it is the government's intent that only proposals with the highest scores on the Technical Self Scoring Worksheet (Attachment 2) will proceed to Step 3, Past Performance Evaluation. If the government evaluates proposals concurrently, the government will evaluate all offerors. In Step 3, the Government will evaluate the past performance record based on the references provided by the offeror and any other available information obtained by other sources. A complete reference is provided by the offeror in Volume IV and includes: past performance information sheet printed by the PPI tool (Attachment 4), and saved as a pdf file, a completed Past Performance Questionnaire (Attachment 5) only if no CPARS is available, Consent Letter (Attachment 6), if applicable, and Client Authorization Letter (Attachment 7), if applicable. Only completed references will be included in the integrated assessment of recency, relevancy and quality of past performance for each offeror. The government past performance evaluation will include verification of dates of service (recent) as well as a determination of relevancy and the quality of performance on that reference to assess the Government's confidence in an offeror's ability to supply services that meet users' needs. Performance confidence will be assessed at the overall Past Performance factor level. As a result of an analysis, each offeror with an acceptable submission and administrative compliance record and an acceptable technical capability shall receive an integrated Performance Confidence Assessment rating for the past performance factor as described below in Table 1.

2.1.3.1. To be **recent**, the effort must have been ongoing for at least six (6) months prior to the date this solicitation is issued and must have been in performance within the three (3) years preceding the date of issuance of this solicitation. The Government will not evaluate past performance information that fails to meet this recency criteria.

2.1.3.2. The most **relevant** contracts will be those which most closely match the scope, magnitude, complexity and applicability of the contract. The scope considers the types of labor categories [Part 8, Attachment 4, Position Descriptions], and services/operational activities [Part 8, Attachment 5, Statement of Objectives] on a single task

order or contract. Offerors shall not consolidate option periods or individual task orders, GSA, FSS, BPA or commercial agreements to increase relevancy. A scope of at least one (1) full service or two (2) different MSS labor categories on a single contract is relevant. Magnitude considers the number of personnel provided on a contract and the overall dollar value of the performance reference [greater than 2 full time personnel and a value of greater than or equal to \$70K} to be relevant. The solicitation minimum or maximum is not reflective of the overall program size for purposes of past performance evaluation. Complexity considers the nationwide geographic locations [at least two states] and the business relationship between the prime and the subcontractor(s). Applicability considers the customer as well as contract and pricing type performance. To be relevant, the reference is for a FFP type of contract for a DoD customer. The Government may not agree with the offeror's opinion of relevancy.

2.1.3.3. The Government may take the percentage of work into consideration from Attachment 1, Contractor Teaming/Organizational Structure (Tab 2c of the Technical Volume and Tab 4 of the Past Performance Volume), if applicable, when assigning the overall confidence rating. If the teaming structure provided is incomplete or unclear, it may result in a lower performance confidence rating. Submittal of past performance information for a teaming partner/subcontractor for a specific full service/operational activity who will not be performing that work with the offeror may not be considered relevant.

2.1.3.4. Submitted information may include data on efforts performed by other divisions, critical subcontractors, or teaming contractors, if such resources will be brought to bear or significantly influence the performance of the proposed effort. The Government may consider as relevant efforts performed for agencies of the federal, state, or local Governments and commercial customers. Each previous/current contract provided in the proposal will receive one of the relevancy ratings listed in Table 2 – Past Performance Relevancy Assessment below.

<b>Table 1 - Performance Confidence Assessments</b>	
Rating	Description
Satisfactory Confidence	Based on the offeror's recent/relevant performance record, the Government has a reasonable expectation that the offeror will successfully perform the required effort.
Neutral Confidence	No recent/relevant performance record is available or the offeror's performance record is so sparse that no meaningful confidence assessment rating can be reasonably assigned. The offeror may not be evaluated favorably or unfavorably on the factor of past performance.
Limited Confidence	Based on the offeror's recent/relevant performance record, the Government has a low expectation that the offeror will successfully perform the required effort.
No Confidence	Based on the offeror's recent/relevant performance record, the Government has no expectation that the offeror will successfully perform the required effort.

<b>Table 2 - PAST PERFORMANCE RELEVANCY ASSESSMENT</b>	
Rating	Description
RELEVANT	<p>Past/present performance effort involved much of the scope, magnitude of effort and complexities this solicitation requires.</p> <ul style="list-style-type: none"> <li>• Provides one (1) MSS full service/operational activity or two (2) different MSS labor categories; and</li> <li>• Provides &gt; two (2) FTEs; and</li> <li>• Contract is a FFP contract - Value is &gt; or = to \$70K annually; OR</li> <li>• Performs in at least two (2) states; and</li> <li>• Customer is DHA or Air Force</li> </ul>
SOMEWHAT	Past/present performance effort involved some of the scope, magnitude of effort and

RELEVANT	<p>complexities this solicitation requires.</p> <ul style="list-style-type: none"> <li>• <i>Provides at least one (1) MSS full service/operational activity or one (1) MSS labor category; and</i></li> <li>• <i>Provides &gt; 0.1 but &lt; or = 2 FTEs; and</i></li> <li>• <i>Contract Value is at least \$40K annually; and</i></li> <li>• <i>Performs in at least one (1) or more state; and</i></li> <li>• <i>Any customer is acceptable</i></li> </ul>
NOT RELEVANT	<p>Past/present performance did not involve any of the scope, magnitude of effort and complexities this solicitation requires.</p> <ul style="list-style-type: none"> <li>• <i>Provides none of the solicited medical support services; or</i></li> <li>• <i>Contract value is less than \$30K annually</i></li> </ul>

2.1.3.5. The evaluation for the Past Performance volume will ensure that the offeror provided the record of relevant past performance on up to eight (8) previous/current contracts with three (3) being for the offeror's performance as prime. The evaluation will ensure that past performance information is provided for each teaming partner/subcontractor whose percentage of contract workload is highest as documented in Attachment 1, Team Composition Worksheet. The Government will use data provided by each offeror in this volume and data obtained from other sources during the evaluation. The Government will then assign a relevancy rating to each past performance reference per Table 2. NOTE: If the prime has no partners, all references will be for the offeror.

2.1.3.5.1. If three (3) references are not available from the offeror as a prime contractor, reference(s) as a teaming partner/subcontractor may be provided or key personnel; however, the Government will consider performance as the prime contractor more relevant than performance as a subcontractor. Performance as a sub-contractor is considered more relevant than performance of key personnel.

2.1.3.5.2. If an offeror is a joint venture (JV) with no past performance information, the past performance record of all companies forming the JV will be considered and the past performance section must contain references from each company forming the JV. If the JV company, as the offeror, has a past performance record, the past performance record of the JV company will be considered for evaluation purposes. If the JV company has less than three (3) past performance records for the offeror, the past performance records of the individual companies comprising the JV will be considered to make up the minimum number of three (3) past performance references for the offeror. If a JV is comprised of both a small and large business, performance by the small business company will be considered more relevant than performance by the large business company.

2.1.3.5.3. If an offeror is a Mentor Protégé (MP) with no past performance information, the mentor's past performance record will be considered. However, the Government will consider performance references provided for both the mentor and the protégé more relevant than performance references for just the mentor.

2.1.3.5.4. Each contract shall be considered a single reference for purposes of this evaluation. If past performance proposal provides separate task orders for a single contractor into multiple references, the Government will consider those task orders as a single reference. Contract or task/delivery orders, Federal Supply Schedule contracts, GSA orders, or blanket purchase agreements containing option periods will also be evaluated as a single past performance reference over the life of the contract.

2.1.3.5.5. Quality of Performance. Past Performance Questionnaire sent to the reference by the offeror must be included in Volume III in each reference Tab (1A through 2E). The evaluator must sign all questionnaires. The source selection evaluation team will NOT consider any past performance questionnaires that are incomplete or unsigned by the customer. The Government will consider the performance quality of recent, relevant efforts. In addition, the Government may utilize: (1) official Contractor Performance Assessment Reporting Systems (CPARS) reports from the Past Performance Information Repository System (PPIRS) or similar systems of other Government departments and agencies, (2) questionnaires tailored to the circumstances of this acquisition, (3) information from the Defense Contract Management Agency (DCMA), (4) interviews with program managers and

contracting officers, and (5) other sources known to the Government, including commercial sources. The quality level assigned by the performance raters is shown in Table 3, Performance Quality Ratings below.

2.1.3.5.6. Primary customer contacts will complete the questionnaire using the performance ratings per Table 3 – Performance Level below. Other sources of past performance information will also be assigned this level of performance rating by the Government during the evaluation.

CODE	Table 3 - PERFORMANCE LEVEL
<b>E</b>	<b>EXCEPTIONAL</b> – The contractor’s performance meets contractual requirements and consistently exceeds many. Very few, if any, minor problems were encountered. Contractor took immediate and effective correction action.
<b>V</b>	<b>VERY GOOD</b> – The contractor’s performance meets contractual requirements and consistently exceeds some. Some minor problems encountered. Contractor took effective and timely corrective action.
<b>S</b>	<b>SATISFACTORY</b> – The contractor’s performance meets contract requirements. For any problems encountered, the contractor took effective corrective action.
<b>M</b>	<b>MARGINAL</b> – The contractor’s performance does not meet some contract requirements. For problems encountered, corrective action appeared only marginally effective, not effective or not fully implemented. Customer involvement was required.
<b>U</b>	<b>UNSATISFACTORY</b> – The contractor’s performance does not meet most contract requirements. Serious problem(s) encountered. Corrective actions were either ineffective or non-existent. Extensive customer oversight and involvement was required.
<b>N</b>	<b>NOT APPLICABLE</b> – Unable to provide a rating. Contract did not include performance aspect.

2.1.3.5.7. Adverse past performance is defined as past performance information that supports a less than satisfactory rating overall or any unfavorable comments received from sources without a formal rating system.

2.1.3.5.7.1. Adverse past performance is considered to be any overall rating below Satisfactory on any questionnaire, survey, or Government evaluation. Offerors with adverse past performance will be afforded an opportunity to address alleged performance issues if the offeror has not already been provided an opportunity to comment on the issues IAW FAR 15.306(a)(2) and FAR 15.306(b)(4). Where a relevant performance record indicates performance problems, the Government will consider the number and severity of the problems and the appropriateness and effectiveness of any actual implemented corrective actions (not merely planned or promised). The Government may review more recent contracts or performance evaluations to ensure corrective action has been implemented and to evaluate its effectiveness.

2.1.3.6. Assigning Ratings: As a result of the relevancy and quality assessments of the recent contracts evaluated, offerors will receive an integrated performance confidence assessment rating (Table 1) at the factor level. If an Offeror’s past performance rating is “Limited Confidence” or “No Confidence”, the Offeror will no longer be considered for award. Offerors without a record of relevant past performance or for whom information on past performance is not available will not be evaluated favorably or unfavorably on past performance. As a result, these offerors will receive a "Neutral Confidence" rating for the Past Performance factor.

2.1.3.6.1. More relevant performance will have a greater impact on the Performance Confidence Assessment than less relevant effort. A strong record of relevant past performance may be considered more advantageous to the Government than a "Neutral Confidence" rating. Likewise, a more relevant past performance record may receive a higher confidence rating and be considered more favorably than a less relevant record of favorable performance.

## 2.1.4 VOLUME IV – PRICE FACTOR

Step 4 is the government’s evaluation of the offeror’s price volume for completeness and price reasonableness. However, the government reserves the right to evaluate offeror pricing for realism.



2.1.4.1. Completeness: The Government will review the Pricing submissions for completeness of all hourly rates as well as Total Evaluated Price. The completeness review will focus on whether the offeror used the Government-developed Excel file as required, and whether the pricing tables included blanks, or unreadable files, copies or data were received. Incomplete price submissions may not be evaluated and the offeror's proposal may be eliminated from the competition. The government's completeness review will include all fully burdened hourly rates and total evaluated price in the Pricing Template at Attachment 3.

2.1.4.1.1. The Government will evaluate offers for award purposes using the Total Evaluated Price (TEP). The estimated workload and the TEP are for evaluation purposes only and no way represent true or future obligated or total dollars. Nor, do they reflect the overall contract maximum or likely order level.

2.1.4.1.2. The TEP is calculated as the sum of the offeror's total prices for Year 1, 2, 3, 4, and 5 for Service Type #1 (see Pricing Template, Wksht 3, Row 18, Column AR). Although the TEP shown in Wksht 4, Cell A2, it is the offeror's responsibility to ensure the TEP and fully burdened Hourly Rate cells are complete and accurate.

2.1.4.2. Reasonableness. The Government will conduct a price analysis. The source selection will be conducted with the expectation of adequate price competition and will rely on market forces and price analysis to ensure that evaluated prices are fair and reasonable. Comparison of proposed prices received in response to the solicitation is the preferred and intended price analysis technique. Other techniques and procedures, if deemed necessary, may be used to ensure a fair and reasonable price, to include but is not limited to the following: a comparison of all offerors proposed fully burdened labor rates, comparison of previously proposed prices and previous Government and commercial contract prices with current proposed prices for the same or similar service/items, comparison with competitive market prices of similar indexes, and GSA Schedule(s) or Department of Labor wage/salary indexes or comparison of proposed prices with the Independent Government Cost estimate or Department of Labor Wage Determinations.

2.1.4.3 Realism. The proposed fully burdened hourly rates may be evaluated for price realism. As stated in the instructions, for the purposes of this acquisition, the fully burdened rates should include all worker direct labor costs as well as any fringe benefits, overhead, general and administrative expenses, and/or profit. If the Government evaluates for realism (low price), proposed fully burdened hourly rates will be compared to Service Contract Labor Standards (SCLS) requirements and the highest Wage Determination rate for the nation. While offerors are free to submit whatever fully burdened hourly rates they see fit, offerors are encouraged to consider the SCLS requirements and the most current Wage Determinations when developing their prices. If the Offeror's proposed fully burdened rate is lower than the SCLS minimums, the Government may determine the Offeror's pricing to not be realistic.

>END ADDENDUM to 52.212-2<

#### ADDENDUM TO FAR 52-212-1

#### ADDENDUM TO FAR 52.212-1

#### PROGRAM STRUCTURE AND OBJECTIVES

- a. The resulting contracts from this acquisition will be Indefinite Delivery/Indefinite Quantity (IDIQ) Multiple Award Contracts (MACs). This requirement is 100% small business set-aside under North American Industry Classification System (NAICS) number 621999. The Government anticipates awarding approximately 20 IDIQ contracts.
- b. All referenced documents for this solicitation are available on the Federal Business Opportunities (FedBizOpps) web site at <http://www.fbo.gov> under the Solicitation Number HT0014-17-R-0010 Potential offerors are encouraged to subscribe for real-time e-mail notifications when information has been posted to the website for this solicitation.
- c. Market research confirmed that subcontracting and teaming arrangements are necessary because of the broad scope of the contract requirements; therefore such arrangements are encouraged to ensure mission success. However, during the contract competition, if a company is identified as a prime contractor or teaming partner/subcontractor on any proposal for this acquisition, then they cannot participate as a prime contractor or

teaming partner/subcontractor on any other offeror's proposal(s). This limitation includes the companies of mentor protégé arrangements and joint venture partners. After award of contracts, for subsequent task order competitions, the government continues to prohibit cross-teaming.

d. For consideration in developing a proposal, the maximum program size is \$969M over a five year ordering period. The Government will award each contract the total maximum program size, allowing the ordering Services to expend program funds on a task order by task order fair opportunity basis as specified in Part 1, Paragraph 1.2 (Subsequent Task Orders). However, since this contract is an ID/IQ-ordering vehicle, the Government does not guarantee the contract holders any awards above the minimum contract award outlined in Part 1, Paragraph 1.9 (Post Award Conference). Congressional budget year allocations and prioritized requirements may drive future task order awards and exercise of task order options.

## 2. GENERAL INSTRUCTIONS

a. This section provides guidance for preparing proposals as well as specific instructions on the format and content of the proposal. Offerors are required to meet all solicitation requirements, including terms and conditions, representations and certifications, and technical requirements, in addition to those identified as evaluation factors or subfactors. Non-conformance with the instructions may result in an unfavorable proposal evaluation.

b. The Contracting Officer (KO) is the sole point of contact for this acquisition. The KO for this acquisition is as follows:

Ms. Hanika Torio  
8111 Gatehouse Road  
Falls Church, VA 22042  
(703) 275-6371  
E-mail: [hanika.j.torio.civ@mail.mil](mailto:hanika.j.torio.civ@mail.mil)

(1) E-mail is the preferred method of communication. The KO will control exchanges of source selection information between Government and offerors. The Government may use email to transmit such information to offerors only if they are encrypted and includes "Source Selection Information – See FAR 2.101 & 3.104." in the Subject line along with the Solicitation Number HT0014-17-R-0010. Otherwise, the Government will transmit source selection information via fax. Offerors may send questions via e-mail to both the KO [hanika.j.torio.civ@mail.mil](mailto:hanika.j.torio.civ@mail.mil) and the CS [john.a.cowgill4.ctr@mail.mil](mailto:john.a.cowgill4.ctr@mail.mil); however, no proposals will be accepted via email or fax.

(2) Offerors who determine that the technical requirements of this RFP require clarification(s) in order to permit submittal of a responsive proposal are requested to submit all questions in writing on or before 26 July 2017. These questions shall be directed to the KO and CS identified above. The Government will issue RFP Questions and Answers on fbo.gov and amend the RFP if required to clarify RFP requirements.

The deadline for questions in response to Government-issued RFP as amended is 21 August 2017 at 2 p.m. EDT. Offerors are instructed to email questions to John Cowgill [john.a.cowgill4.ctr@mail.mil](mailto:john.a.cowgill4.ctr@mail.mil) and Hanika Torio [hanika.j.torio.civ@mail.mil](mailto:hanika.j.torio.civ@mail.mil).

(3) If discussions are held, the KO will promptly notify offerors of any decision to exclude them from the competitive range; whereupon, offerors may request and receive a debriefing in accordance with FAR 15.505. Offerors excluded from the competitive range may request a pre-award debriefing or may choose to wait until after the source selection decision to request a post-award debriefing. However, offerors excluded from the competitive range are entitled to no more than one debriefing for each proposal. The KO will notify unsuccessful offerors in the competitive range of the source selection decision in accordance with FAR 15.506. Upon such notification, unsuccessful offerors may request and receive a debriefing. Offerors desiring a debriefing must make their request in accordance with the requirements of FAR 15.505 or 15.506, as applicable.

e. Elaborate formats, or color presentations are not desired or required. Offeror may only include corporate logos in Volume I – Administration.

f. Oral presentations will not be considered for this competitive acquisition.

g. Proprietary information shall be clearly marked. Proprietary information submitted in response to this solicitation will be protected from unauthorized disclosure as required by Subsection 27 of the Office of Procurement Policy Act as amended (41 U.S.C. 423), hereinafter referred to as “the Act”, as implemented in the FAR.

h. The Government requires an electronic proposal submission with the offeror’s entire proposal loaded on a single DVD-R (Digital Versatile Disk – Recordable). The Government does not require any paper proposals. Due to mailbox constraints, offerors may not submit proposals to the Government via e-mail; faxed copies are also not authorized. The disk shall be labeled with the Company Name, the Solicitation Number and date submitted to the Government. As a minimum, each volume must be in a different directory (folder) on the disk. Offerors shall include separate files with the required naming conventions in accordance with Table 1 below. All documents shall be submitted in portable document format (PDF) format that is created to be searched and copied with the EXCEPTION of the unique files in the Government specified format (See Table 1). DO NOT submit any documents in PDF format that are copied as “images.” The offeror’s documents/files will be provided in a non-compressed format. It is the sole responsibility of the Offeror to ensure that the electronic files submitted are virus free.

(1) Offerors must send their electronic proposal disk by United State Postal Service, FedEx or United Parcel Service or hand delivered to Hanika Torio, C/O David Green, Defense Health Agency, 2776 C Street, Area B, Building 6, Suite 200, Wright-Patterson AFB, OH 45433. Pre-arrangement for hand delivery is required. Email Mr. David Green at david.d.green7.civ@mail.mil for arrangements NLT 7:00 AM Eastern time on 5 Sep 2017, if hand delivery is required." It is the Offeror’s responsibility to make those arrangements to assure meeting the proposal deadline. If the Offeror decides to mail the proposal, it is the Offeror’s responsibility to assure the correct address and to meet the proposal deadlines. The government will not accept late proposals even if due to third party shipping delays. Proposals received after the due date and time specified herein will be considered late, will not be evaluated and will be deemed ineligible for award.

(2) Offerors shall not lock, encrypt, copy as an image, password protect or otherwise place barriers to opening files for their proposal submissions. In the event where the Government cannot access the electronic version to complete evaluation, the government will consider the offer invalid and the proposal will be deemed ineligible for award.

(3) If the Government receives more than one DVD-R from an Offeror, the proposal will be deemed invalid, will not be evaluated and will be deemed ineligible for award.

i. All proposal information is subject to verification by the Government. The documentation must be in the Offeror’s name as submitted in Block 17a of the Standard Form (SF) 1449, Solicitation/Contract/Order for Commercial Items, with a corresponding Cage Code and DUNS Number. Offerors shall assume that the Government has no prior knowledge of their operation and will rely on documentation provided as part of the Offeror’s proposal. By signing the SF 1449, the Offeror acknowledges that the terms and conditions of the proposals are valid for a minimum of 180 calendar days after the proposal due date in Block 8.

j. Files shall not contain classified data and must adhere to the page limitations in Table 1. The Government will not read and evaluation pages that exceed any limitation identified in Table 1, Proposal Organization. For this document, an electronic page is identified as follows:

- Page: One face of a 8.5” x 11” sheet of paper containing information
- Paragraph: Separated by at least one blank line
- Page Numbering: Sequentially

- Font: Times New Roman Font; 12-point minimum font size
- Margins: Top, Bottom, Left, Right shall be 1"
- Tables graphs and illustrations: Font size no less than 8 point
- Page layout: Orientation may be portrait or landscape

k. The following documents are limited to the Government specified format and remain in the template format (Save files in default format (e.g., Word Document – Set “save as type” to “Word Document [\*.docx]” only and Excel spreadsheets – Set "save as type" to "Microsoft Excel Workbook [\*.xlsx]").

- SF1449 and all Amendments (SF 30)
- Team/Organizational Structure (Attachment 1)
- Technical Self Scoring Worksheet (Attachment 2)
- Pricing Template (Attachment 3)
- Past Performance Information (PPI) Tool (Attachment 4)
- Past Performance Questionnaire (Attachment 5)

l. Representations and Certifications: Offerors shall ensure that their registration in the System for Award Management (SAM) database is current, complete, and applicable to this solicitation. The Contracting Officer will check SAM and document the contract file.

m. Cross-referencing: Each volume shall be written on a standalone basis so that its contents may be evaluated with no requirement to cross-reference to other volumes of the proposal. Information required for proposal evaluation which is not found in its designated volume will be assumed to have been omitted from the proposal. Offerors are responsible for the accuracy of their proposals and the Government will not search for information that is not provided in the required Volume.

n. Award without Discussions: It is the Government’s intent to award without discussions. Therefore, each initial proposal should contain the offeror’s best effort to demonstrate technical, past performance and price. However, the Government reserves the right to conduct discussions if the Contracting Officer determines that discussions are necessary.

o. Clarifications: Offerors are cautioned to submit sufficient information and in the format specified in instructions. Offerors may be asked to clarify certain aspects of the proposal (for example, the relevance of past performance information) or to respond to adverse past performance information to which the offerors have not previously had an opportunity to respond. Communication conducted to resolve minor or clerical errors will not constitute discussions and the contracting officer reserves the right to award a contract(s) without the opportunity for proposal revision.

### 3. PROPOSAL ORGANIZATION

a. The Offeror shall organize the proposal as set forth in Table 1, Proposal Organization and subsequent detailed supporting documentation provided in proposal tabs. In accordance with Paragraph 2.h, electronic proposals are required. The Offeror shall organize their proposal by Volume and submit the proposal on a single disk with four (4) separate electronic folders, labeled by volume number and title, as follows:

Volume I – Contract Administration  
 Volume II – Technical Capability  
 Volume III – Past Performance  
 Volume IV – Price

b. Within each of the four (4) folders, offerors will submit the required information, electronic documents or supporting materials per Table 1 below. Offerors must include their company name and volume number as shown in the filename of each document. An example is shown in Table 1. For example, ABC Incorporated filename for Volume II, Scope supporting documentation would be: ABC.VOLII.TAB2A.pdf. (Filenames do not have to be capitalized). Offerors may make minor adjustments to the file naming methodology so long as the resulting file

names and organization are clearly understandable. Offerors should plan on submitting a single file for each item versus multiple files.

**Table 1 - Proposal Organization**

Para	Volume	Title	Page Limit	File Name Example *see 3.b above
6	I	Tab 1 – SF 1449 and all Amendments (SF 30) signed by an authorized representative Tab 2 – Company Information Tab2a – Authorized Offeror Personnel Tab 2b – Company address, Identifying codes and Designations Tab 2c - Teaming/Organization Structure (Attachment 1) Tab 3 – Exceptions to Solicitation Requirements Tab 4 – Certifications and Representations Tab 5 – Letter of Credit Tab 6 – Master Table of Contents Tab 7 – Glossary of Abbreviations and Acronyms	No page limit	ABC.VOLI.TAB1  ABC.VOLI.TAB2 ABC.VOLI.TAB2a ABC.VOLI.TAB2b ABC.VOLI.TAB2c ABC.VOLI.TAB3 ABC.VOLI.TAB4 ABC.VOLI.TAB5 ABC.VOLI.TAB6 ABC.VOLI.TAB7
7	II	Completed Self Scoring Technical Capability Worksheet (Attachment 2) Tabs 1 through 11 are supporting documentation (as applicable) Tab 1a through 1e 2– Scope (LC & SVC) Tab 2a through 2f – Scope (Hard to Fill/Turnover) Tab 3a and 3b – Scope (Healthcare setting) Tab 4a– Magnitude ( Highest contract value) Tab 4b – Magnitude (Total FTEs in 5 years) Tab 4c – Magnitude (Total Contracts) Tab 5a through i –Complexity (locations) Tab 6a through e – Complexity (hard locations) Tab 7a and b – Complexity (Prime Experience) Tab 8 – Complexity (subcontractor management) Tab 9a through e – Applicability (Customers) Tab 10a - Applicability (IDIQ experience) Tab 11a - Applicability (FFP experience) Tab 12 – Teaming/Organizational Structure (Attachment 1)	Tab WKSHT limited to 4 Pages in Government-provided template.  Tabs 1through 11 are supporting documentation (see instructions below); each supporting documentation file is limited to 10 Pages with the exception of the Magnitude tabs which is 40 pages.	ABC.VOLII.WKSHT ABC.VOLII.TAB1* ABC.VOLII.TAB2* ABC.VOLII.TAB3* ABC.VOLII.TAB4a ABC.VOLII.TAB4b ABC.VOLII.TAB4c ABC.VOLII.TAB5 Etc.
8	III <sup>1</sup>	Tab 1A – Prime Reference 1 Tab 1B – Prime Reference 2 Tab 1C – Prime Reference 3 Tab 2A – Teaming Partner (highest % of planned work) Reference 1 Tab 2B – Teaming Partner (second highest % of planned work) Reference 2 Tab 2C – Teaming Partner (third %...) Reference 3 Tab 2D - Teaming Partner (fourth %...) Reference 4 Tab 2E - Teaming Partner (fifth %...) Reference 5 Tab 3 – Organization Change History Tab 4 – Teaming/Organizational Structure (Attachment 1)	Page limited to past performance information (PPI) tool; Page limit of Organizational Change History: 5 pages; Contractor Teaming Structure: Government template	ABC.VOLIII.TAB1A ABC.VOLIII.TAB1B ABC.VOLIII.TAB1C ABC.VOLIII.TAB2A ABC.VOLIII.TAB2B ABC.VOLIII.TAB2C ABC.VOLIII.TAB2D ABC.VOLIII.TAB2E ABC.VOLIII.TAB3 ABC.VOLIII.TAB4

9	IV – Price	Tab 1 – Completed Government Pricing Template (saved in Excel) (Attachment 3) Tab 2 – Price Assumptions	No page limit: Government template	ABC.VOLIV.TAB1
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<sup>1</sup> A complete past performance reference consists of:

1. Past performance information sheet printed from PPI tool (Attachment 4)
2. Past Performance Questionnaire, if required (Attachment 5)
3. Consent letter, if required (Attachment 6)
4. Client authorization letter, if required (Attachment 7)

### 3.1 Volume I – Contract Administration

In this volume of the proposal, the offeror shall provide the following information:

**Tab 1 - Standard Form (SF) 1449, SOLICITATION/CONTRACT/ORDER FOR COMMERCIAL ITEMS and SF 30, AMENDMENT OF SOLICITATION/ MODIFICATION OF CONTRACT:** Complete blocks 12, 17a, 17b (if applicable), 23, 24, 30a, 30b, and 30c of the RFP Section A, SF 1449. In doing so, the offeror accedes to the contract terms and conditions as written in the RFP Sections A through K. These sections constitute the model contract. The SF 1449 shall be provided in Volume 1. If the solicitation is amended, for each issued amendment, complete blocks 8, 15A, 15B and 15C of the SF 30, and include in this section of the proposal.

The government recommends that offerors also consider the requirements above in Paragraph 2.b.(i).

#### Tab 2 - Company Information:

- Authorized Offeror Personnel. Provide the name, title, and telephone number of the company/division point of contact regarding decisions made with respect to your proposal and who can obligate your company contractually. Also, identify those individuals authorized to negotiate with the Government. Additionally, provide the name, title, and telephone number of the CEO, Division President, and/or Vice President of the company for notification purposes.
- Company/Division Address, Identifying Codes, and Applicable Designations. Provide company/division's street address and county; CAGE code; DUNS code; and TIN. This same information must be provided if the work for this contract will be performed at any other location(s). List all locations where work is to be performed and indicate whether such facility is a division, affiliate, or subcontractor, and the percentage of work to be performed at each location.
- Teaming/Organizational Structure (Attachment 1). If subcontractors or teaming partners are proposed, the offeror must complete Attachment 1 showing the government their teaming/organizational structure. The offeror will include the completed document in three areas of their proposal: Volume 1, Tab 2c, Volume II, Tab 12, and Volume III, Tab 4. Attachment 1 should be complete and clearly identify the company names and addresses of all teaming partners or subcontractors that will perform under this contract along with the percentage of projected assigned workload along with the performance locations for that teaming partner. Therefore, the offeror needs to provide the name of the teaming partner/subcontractor for each Product Service Code grouping listed. If more than one company will provide the Product Service Code, each Product Service Code. The offeror will ensure at least 50% of the cost of contract performance incurred for personnel shall be expended for employees/services provided by the concerned. The offeror must comply with all legal requirements, including but not limited to, FAR 52.219-14 – Limitations on Subcontracting, 13 CFR 124-510, 13 CFR 125.6, 15 USC 64.

**Tab 3 - Exceptions to Solicitation Requirements:** Offerors are required to meet all solicitation requirements, such as terms and conditions, representations and certifications, and technical requirements, in addition to those identified as evaluation subfactors. Failure to meet a requirement may result in an offer being ineligible for award. Offerors must clearly identify any exception to the solicitation terms and conditions and provide complete accompanying rationale. Each exception shall be specifically related to each paragraph and/or specific part of the solicitation to which the exception is taken. Provide rationale in support of the exception and fully explain its impact, if any, on

the performance, schedule, cost, and specific requirements of the solicitation. This information shall be provided in the format and content of Table 2 below.

**Table 2 - Solicitation Exceptions**

Solicitation Document	Page/ Paragraph	Requirement/ Portion	Rationale
PWS, Part X, Pricing Template, Past Performance Tool	Applicable Page and Paragraph Numbers	Identify the requirement or portion to which exception is taken.	Describe Why the requirement can/will not be met.

**Tab 4 - Representations, Certifications (Tab 4):** Complete the necessary fill-ins and certifications in Sections D through K. Section K shall be returned in its entirety. For Sections D through I, the offeror shall submit only those pages that require a fill-in.

Mentor-Protégé Agreements and 8(a) Joint Venture Certifications. If the Offeror is part of Mentor-Protégé agreement or an 8(a) joint venture, the offeror shall provide a copy of the Small Business Administration (SBA) approved Mentor-Protégé agreement and/or Joint Venture certification documentation. For either Mentor-Protégé or 8(a) Joint Ventures, the SBA must receive the certification documentation prior to the proposal due date and the Government must receive the SBA-approved documentation before the date of notice or announcement of award of any contract. If the Government does not receive the SBA-approved documentation of the Mentor-Protégé or 8(a) Joint Venture agreement as of notice or announcement of award of any contract, the Mentor-Protégé offeror shall be eliminated from the competition. The Government will not delay contract award waiting for SBA approval.

**Tab 5 - Letter of Credit:** Offerors must include a Letter of Credit to demonstrate the offeror's financial health and capacity to cover startup expenses for this requirement. The document, issued by a bank or other financial institution, shall provide the offeror a line of credit for a minimum of \$2 million. The Letter of Credit shall include contact information of the issuing organization and the Letter of Credit may be contingent upon award of this contract. The date of the letter can be issued anytime between release of the RFP and proposal due date. Offerors may submit a Letter of Credit with an initial expiration date to cover the entire performance period (5-years) or a letter with an initial expiration date that is a minimum period of one year from the date of issuance. If valid for the first year, the letter will be required to be renewed and provided to the contracting officer annually. The document, issued by a bank or other financial institution must include contact information for the issuing organization.

**Tab 6 - Master Table of Contents:** The Offeror shall provide a table of contents in the Contract Administration Volume that serves as an overall guide to what files are provided in electronic format, where they are located, file name and brief descriptions of the documents. The table of contents will not be evaluated.

**Tab 7 - Glossary of Abbreviations and Acronyms:** Include a glossary of abbreviations and acronyms used throughout the proposals (all 4 volumes).

### 3.2 VOLUME II – TECHNICAL CAPABILITY

a. For purposes of this technical proposal evaluation the Offeror shall claim medical support services capability using the government template for the Technical Self-Scoring Worksheet. Offerors may not consolidate more than one Government or commercial contract or task order, (including FSS, GSA, BPAs) or option periods into a single file to claim higher point value. The Government considers task orders to be stand-alone contracts. See additional Supporting Documentation instructions below in Paragraph c. The Offeror shall complete the Technical Self Scoring Worksheet (Attachment 2) in the electronic format provided in this solicitation and provide the completed Excel file and all supporting documentation in Volume II. No other format will be considered. The offeror shall not alter or add rows, columns, or formulas in the worksheet. The worksheet titled "Self Scoring Sheet" has 143 rows divided into 4 Categories: Scope, Magnitude, Complexity and Applicability. Within the Categories, there are 11 Sections that assess capability where points will be assigned based on the requirement. There are locked/protected heading rows, point values and subtotals along with hidden formula rows. Within each section are various elements of importance to the Government. Offerors should consider their past experience as well as their teaming partners to attest to medical support services technical capabilities. Supporting documentation should be for medical support

services. Offerors will be required to provide supporting documentation as proof of their technical capability for the sections and elements within those sections. Claimed capability may be for either the prime contractor (offeror) or teaming partner(s) as identified on the DHA MSS Instructions, Attachment 2, and Technical Self-Scoring Worksheet. For Scope, at least one claimed capability in each of the three (3) elements (Labor Category/Services Placement, Hard-to-Fill/High Turnover Positions and Healthcare Settings) shall be for the offeror. For Magnitude, all the claimed capabilities should be for the prime offeror. For Complexity, for Elements 5 (High Demand Performance Locations) and 6 (Hard-to-Fill Locations), at least one claimed capability must be for the prime offeror; for Elements 7 (Prime Contractor Experience) and 8 (Subcontractor Experience) the claimed capability should be for the prime offeror. For Applicability, Element 9 (Customer Base), at least one claimed capability should be for the prime offeror and Elements 10 (ID/IQ experience) and 11 (FFP Experience) should be for the prime offeror. Supporting documentation requirements is discussed in detail below.

The worksheet has Columns A through P:

Column A is the Section number assigned to that capability element.

Column B is the RFP reference.

Column C is the capability being assessed.

Columns D through G are the level of capability that can be chosen by the offeror.

Column H is a subtotal by row and Section [that populates automatically based on the Column D-G selection].

Column I shows the electronic file name to be used for that Section/Element supporting documentation (see Table 1). Files must be distinguishable by name so that they may be rapidly accessed by the evaluation team.

Columns J through P is a current point of contact for the supporting documentation/item who the government can contact to validate the claim of capability if necessary.

b. The Offeror shall follow the instructions listed below when filling out the rows of the worksheet. For convenience, the instructions are also included in a separate worksheet in the Technical Self Scoring Worksheet titled "Instructions." **Offerors will place an "X" in the proper cell; no other character or word will work in the cell to generate the correlating point value.** Offerors shall not enter a point value as the worksheet will assign a point value based on the selected capability (column). It is important to note the government considers a task order under MAC ID/IQ contracts, including federal support schedule, GSA or BPA orders) a single contract; thus a single supporting documentation requirement.

- Row 1: Enter Offeror name in Column C - Scope Category (Rows 2 to 45).

Rows 2-8, 10, 12, 14, 16: Heading Rows or hidden formula rows.

- Rows 9-18, Labor Category/Service Product Service Code Placement. Place an "X" in the appropriate Column D, E, F, or G associated with the **highest number of FTEs placed on a single contract or order in the last 5 years (from the release date of this solicitation).** **At least one claimed capability must be from the prime offeror:** Certified (Row 9, Section 1, Element a), Specialized/Technical (Row 11, Section 1, Element b), Administrative/Clerical (Row 13, Element c), and Other Medical Support FTEs (Row 15, Element d). If the offeror never placed those types of labor categories/services, leave blank and complete Other Labor Category/Service in Row 17, Element e. This element is for services not in the PSC listed in Element a through d above (see Part I, PWS, Paragraph 1.4 table). Offerors may complete Row 17, Element e if they have placed an "X" in the Columns for Certified (Row 9, Section 1, Element a), Specialized/Technical (Row 11 Section 1, Element b), Administrative/Clerical (Row 13, Element c), and Other Medical Support FTEs (Row 15, Element d). If claiming Row 17, offerors must complete Row 18, Column C to specify the labor category.

- Row 19 is the Labor Category/Services Placement subtotal that automatically populates in Column H based on the above selections.

- Rows 20-23, 25, 27, 29, 31 & 33: Heading rows or hidden formula rows.

- Rows 24-35, Hard to Fill/High Turnover Positions. Place an "X" in the appropriate Column D, E, F, or G associated with the **highest number of FTEs placed on a single contract or order in the last 5 years.** **At least one claimed capability must be from the prime offeror:** Referral Clerk (Row 24, Section 2, Element a), Medical



Appointment Clerk (Row 26, Section 2, Element b), Medical Office Clerk (Row 28, Section 2, Element c), Medical Records Technician (Row 30, Section 2, Element d), Outpatient Medical Coder (Row 32, Section 2, Element e), Beneficiary Services Representative (aka, PEBLO) (Row 34, Section 2, Element f).

- Row 35 is the Hard to Fill/High Turnover Positions Subtotal that automatically populates in Column H based on the above selections.
- Rows 36-38, 40, 42 & 43 are heading rows and hidden formula rows.
- Rows 39-41, Healthcare Setting. Place an “X” in the appropriate Column D or E, associated with your capability and **experience for medical support services in two performance settings (place where services were performed).** **At least one claimed capability must be from the prime offeror:** Outpatient Clinic (Row 39, Section 3, Element a) or Hospital (Row 41, Section 3, Element b). For this solicitation, an Outpatient Clinic is a standalone ambulatory care facility providing outpatient medical care. A hospital is a medical treatment facility capable of providing outpatient and inpatient services. Services performed outside an outpatient clinic or hospital (i.e., remote, corporate headquarters, etc.) would not be included here.
- Row 44 is the Setting Subtotal that automatically populates in Column H based on the above selections.
- Row 45 is the subtotal for the Scope Category. Validate that the points were correctly calculated and transfer properly to the Total Points Summary worksheet, Row 5, Column B.
- Magnitude Category (Rows 46-61) – All claimed capabilities should be for the prime offeror. Offerors should select a single contract or order with the highest total value (including options) and provide up to 10 pages for supporting documentation. Next, prime offerors should support the total number of Medical Support Service FTEs placed for the Government in the last 5 years from the date of the solicitation and provide up to 40 pages for supporting documentation. Then, the prime offeror will total up all active contracts (only for the offeror) managed in the last 5 years from the date of the solicitation and provide up to 40 pages of supporting documentation.
- Rows 46-49, 50-55 & 59 are heading rows and hidden formula rows.
- Row 51, Highest total Value on a single contract or order as the prime offeror. Place an “X” in the appropriate Column D, E, F or G.
- Row 56, Total Medical Support Service FTEs placed for the Government in the last 5 years. Place an “X” in the appropriate Column D, E, F or G.
- Row 60, Total number of active contracts or orders providing medical support services to the Government as of the date of the solicitation. Place an “X” in the appropriate Column D, E, F or G.
- Row 61 is the subtotal for the Magnitude Category. Validate that the points were corrected calculated and transferred properly to the Total Points Summary worksheet, Row 6, Column B.
- Complexity Category (Rows 62-115).
- Rows 62-66, 68, 70, 72, 74, 76, 78, 80, 82, 84 are heading rows or hidden formula rows.
- Rows 67-85, High Demand Performance Locations. Place an “X” in Column D or E attesting to historic capability of providing Medical Support Services in the listed performance locations. At least one claimed capability must be from the prime offeror. Offerors may enter one “Other” location and are required to specify the location in Row 86.
- Row 87 is the High Demand Performance Locations Subtotal that automatically populations in Column H based on the selections above.
- Rows 88-91, 93, 95, 97, 99 are heading rows or hidden formula rows.
- Rows 92-100, Hard to Fill Locations. Place an “X” in Column D or E attesting to your historic capability of providing Medical Support Services in the listed performance locations. At least one claimed capability must be from the prime offeror.
- Row 101 is the Hard to Fill Locations Subtotal that automatically
- Rows 102-105, 107 are heading rows or hidden formula rows
- Rows 106-108, Prime Contractor Experience. Place an “X” in Column D or E attesting to the prime offeror’s performance capability as the Prime and subcontractor.
- Row 109 is the Prime Contractor Experience Subtotal that automatically
- Rows 110-113 are heading rows or hidden formula rows.

- Row 114, Subcontractor/Team Management. Place an “X” in Column D or E attesting to the prime offeror’s historic capability of managing teaming partners/subcontractors.
- Row 115 is the subtotal for the Complexity Category. Validate that the points were correctly calculated and transferred properly to the Total Points Summary worksheet, Row 7, Column B.
- Applicability Category (Rows 116-143).
  - Rows 116-120, 122-136, 138-141 are heading rows and hidden formula rows.
  - Rows 121-129, Customer Base. Place an “X” in Column D or E attesting to historic capability of providing Medical Support Services to the listed customers. At least one claimed capability must be from the prime offeror. For multiple MTFs involving different Services or multi-market sectors, the customer should be reported as DHA. If performance is at a single MTF, the customer would be based on what service owns that MTF. Offerors may claim one “Other” location in Row 129, but must complete Row 30, Column C to specify the customer.
  - Row 137, Indefinite Delivery/Indefinite Quantity Contract Experience. Place an “X” in Column D or E attesting to the prime offeror’s historic capability of performing on an Indefinite Delivery/ Indefinite Quantity Contract.
  - Row 142, Firm Fixed Price Contract Experience. Place an “X” in Column D or E attesting to the prime offeror’s historic capability of performing on a Firm Fixed Price Contract.
  - Row 143 is the subtotal for the Applicability Category. Validate that the points were correctly calculated and transferred properly to the Total Points Summary worksheet, Row 8, Column B.

c. The Offeror shall provide supporting documentation for each section and element in the four (4) Categories of Scope, Magnitude, Complexity and Applicability when points are being granted in the Technical Self Scoring Worksheet. This documentation will be a scanned pdf file and will follow the required naming convention shown in Table 1. Offerors will highlight (by color or circling) the information in the document(s) that validate their claimed technical capability.

Offerors must provide a single file as supporting documentation. For example, Tab 1 has five (5) elements a through e. An offeror can provide documentation to support capability. Each element will be a separate pdf file. Offerors should use the naming convention: company name.VolII.TAB1a, company name.VolII.TAB1b, company name.VolII.TAB1c, company name.VolII.TAB1e, company name.VolII.TAB1e,. If an offeror is NOT claiming capability on a particular element, they should not provide a file with that TAB name in their proposal. A single supporting document file may apply to more than one row on the Self-Scoring Technical Capability Worksheet as long as that document supports the claimed items. If an offeror uses the same contract to support multiple elements/section on the worksheet, offerors shall rescan and follow the naming convention for the item to ease retrieval and validation procedures.

The Offeror shall not consolidate requirements on multiple task/delivery orders to obtain a higher point value since contract or task order (including commercial, MAC ID/IQ, GSA, FSS or BPA orders) are considered a single contract under this solicitation. Thus, each contract, order or other binding business agreement will stand alone to support a claimed item and will be a separate supporting documentation file provided in the proposal. Likewise, the Offeror shall not consolidate requirements for different option periods on the same contract or order to obtain a higher point value as part of their supporting documentation. To illustrate, an offeror has two separate contracts (or task orders) where they provide a total of four (4) certified medical support FTEs. The offeror cannot combine them to total 8 FTEs to get the maximum points available on the Self Scoring Technical Worksheet [of 100 points). The offeror could only claim 4 FTEs and provide one of those contracts as supporting documentation. If, on the other hand, the offeror provided all 8 FTEs under one contract or task order the offeror could claim all 8 FTEs and self-score at 100 points. The following supporting documentation is acceptable:

- For Government Contracts: Provide a signed copy of the SF 1449, SF33 or DD1155 along with other contract pages that show clearly detail the claimed item (labor category, FTE, location, dollar value, etc.).
- For Commercial Contracts: Provide a signed and dated letter from the customer that confirms the claimed element on the worksheet. A clear name, title, address and phone number for the customer must be on the letter.

Offerors are cautioned that the supporting documentation must demonstrate performance in the area claimed on the Technical Self-Scoring Worksheet (i.e., labor category, location, number of full-time equivalent [FTEs]. For

example, if you are attesting to the government you provide 7+ FTEs in the Certified Medical Support Positions Product Service Code, the documentation provided must clearly show more than seven (7) positions on a single order or contract. The Government reserves the right to review any information related to the supporting documentation for validation only obtained by the government to aid in validating the technical capability. The supporting documentation must match the services of this solicitation.

### 3.3 VOLUME III – PAST PERFORMANCE

Past performance tool (see Attachment 4 for data requirements on the past performance tool): The Offeror shall use the past performance information (PPI) tool for submitting up to eight (8) recent past performance references and contract information. This tool can be downloaded from FedBizOpps (<https://www.fbo.gov/>) as an attachment to this solicitation posting. The Offeror shall save each past performance reference from the past performance tool on the submitted DVD-R. If the Offeror is unable to download the past performance information tool, contact the PKO for assistance. The Offeror must save the PPI database file using the following convention: Prime Contractor Name + RFP Number.accdb (e.g., XYZCompanyHT0014-17-R-0010.accdb). There are no page numbering, line spacing or font size restrictions on the PPI tool. No page limitation applies as it is dictated by the PPI tool. Offerors will not print and scan the information; the Government requires the database in its entirety.

A complete past performance reference consists of:

1. Past performance information sheet printed from PPI tool (Attachment 4)
2. Past Performance Questionnaire, if required (Attachment 5)
3. Consent letter, if required (Attachment 6)
4. Client authorization letter, if required (Attachment 7)

Past performance Questionnaire (if required) (Attachment 5): The Offeror is responsible for initiating Past Performance Questionnaire (PPQ) only if the past performance reference is not available in CPARS. The Offeror will forward the questionnaire to the primary customer point of contact (POC), with instructions to send the completed, signed questionnaire back to the Offeror. Offerors shall provide completed and signed questionnaires as part of the Past Performance Volume of their proposal.

Subcontractor/teaming partner consent letter (if required) (Attachment 6): Past performance information pertaining to a subcontractor cannot be disclosed to the prime Offeror without the subcontractor's consent. Provide with the proposal, a letter from all subcontractors that will perform major or critical aspects of the requirement, a letter consenting to the release of their past performance information to the Offeror.

Client authorization letter (if required) (Attachment 7): Each Offeror, teaming partner, and/or joint venture partner shall execute a Client Authorization Letter for commercial customers.

TAB 1 – References from Prime Offeror. At least three (3) references of the eight (8) maximum references must be for the Prime offeror. All required documents should be scanned into a pdf file in the above order and named ABC.VOLIII.TAB1A, 1B and 1C.

TAB 2 – References for Teaming Partner/Subcontractor. Offerors may submit up to five (5) references (of the eight (8) maximum) to ensure at least one for each proposed teaming partner/subcontractor. If more than five teaming partners/subcontractors are proposed, offerors are required to submit references for the teaming partners or subcontractors that will perform the highest percentage of work as identified in Attachment 1 of their proposal. All required documents should be scanned into a single pdf file in the above order and named ABC.VOLIII.TAB2A, 2B, 2C, 2D and 2E. If no teaming partners are proposed, up to eight (8) references will be for the offeror. The file naming convention can remain the same.

TAB 3 – Organization Change History. Many companies have acquired, been acquired by, or otherwise merged with other companies, and/or reorganized their divisions, business groups, or subsidiary companies or had name changes. In many cases, these changes have taken place during the time of performance for relevant past efforts or between the conclusion of recent past efforts and this source selection. To clarify any organizational changes, the Offeror shall provide a "roadmap" describing all such changes in the organization of the company. A pamphlet or other commercial document describing such reorganizations may suffice within the page limit identified in Table 1,

Proposal Organization. As part of this explanation, show how these changes impact the relevance of any efforts the Offeror identified for past performance evaluation/performance confidence assessment.

**TAB 4 - Teaming/Organizational Structure (Attachment 1).** If subcontractors or teaming partners are proposed, the offeror must complete Attachment 1 showing the government their teaming/organizational structure. The offeror will include the completed document in three areas of their proposal: Volume 1, Tab 2c; Volume II, Tab 12 and Volume III, Tab 4. Attachment 1 should be complete and clearly identify the company names and addresses of all teaming partners or subcontractors that will perform under this contract along with the percentage of assigned workload for each company and which services the teaming partner will provide. Therefore, the offeror needs to provide the name of the teaming partner/subcontractor for each Product Service Code grouping listed. If more than one company will provide the service category, each service category. The plan will ensure at least 50% of the cost of contract performance incurred for personnel shall be expended for employees/services provided by the concerned. The contractor's plan must demonstrate and describe compliance with all legal requirements, including but not limited to, FAR 52.219-14 – Limitations on Subcontracting, 13 CFR 124-510, 13 CFR 125.6, 15 USC 64.

### **3.4 VOLUME IV – PRICE**

3.4.1. Offerors shall use the government provided Pricing Template (Attachment 3) for their price volume. Offerors will provide a complete fully burdened hourly rate for 39 labor categories (Service Type I) only. Using the standard position descriptions at Part 8, Attachment 4 and the Pricing Performance Work Statement at Attachment 8, the estimated FTEs, projected billable hours and locations in the sample order in Worksheet 2 of the Pricing Template, offerors should develop a single fully burdened rate by labor category and a total evaluated price for evaluation. There are no Service Type II estimates requiring pricing in the template. Offerors are advised that not every labor category in the available position descriptions or each performance location are included in the sample order Pricing Template. The fully burdened rates should include all costs, including but not limited to, worker direct labor costs as well as any fringe benefits, overhead, general and administrative expenses, and/or profit.

This template will be used by the Pricing Evaluation Team during the source selection process. Instructions are provided below and also repeated in the spreadsheet. Offerors must complete the model as designed. No attempt to reformat or remove cells is authorized. Submission of pricing data needs to be complete and accurate. Leaving cells blank or entering "N/A" or zeros are not acceptable values for these cells and will adversely affect the formulas in the Excel file. Hourly rates should be rounded to the nearest-two decimal format (i.e., \$15.32). Failure to comply with these terms and conditions may result in the offeror being removed from consideration for incomplete data submission. Incomplete pricing may result in an offeror's proposal being deemed ineligible for award.

Problems encountered with the spreadsheet design that prevent accurate recording of price data shall be brought to the attention of the Contracting Officer immediately. The Government will not recreate electronic files, or in any way develop pricing tables for the offeror in order for electronic evaluation to occur.

The MSS Pricing Template contains four (4) worksheets:

Worksheet 1 - Instructions. Worksheet 2 - Projected FTE and billable hours for Svc Type#1. Worksheet 3 - Entry sheet for Svc Type#1 - fully burdened hourly rates. Worksheet 4 – Total Evaluated Price. Reference Part 8, Attachment 3 for potential performance locations and; Part 8, Attachment 4 for standard position descriptions.

Worksheet 2. Projected FTE for Svc Type#1 – provides projected FTEs by Labor Category and Performance Location annually (to be considered for each annual pricing.) No entry is done on this worksheet, but is the required information with total FTEs and billables hours (FTEs times 1920) by performance location and customer.

Worksheet 3. Svc Type#1 – Fully Burdened Hourly Rate Entry Sheet. To complete Worksheet 3 offerors are to look at each position description for education, experience and qualification requirements (Part 8, Attachment 4), the pricing Performance Work Statement (Instructions Attachment 8), as well as the projected FTEs by Labor Category and Performance Location in Worksheet 2. The Government calculated projected billable hours by taking the total FTE number times the 1920 productive hours in a standard man-year. Offerors shall consider this when developing a fully burdened hourly rate. Offerors shall enter a fully burdened hourly rates for the 42 Labor Categories for the 5-contract years in Rows 6 to 10, Columns B - AQ. The spreadsheet calculates a labor category subtotal for Year 1

through Year 5 in Rows 12 to 16, Columns B through AQ. Then, a total for all years adds Years 1, 2, 3, 4 and 5 together by labor category in Row 17. A total for Service Type I requirements is in Row 18, Column AR.

Worksheet 4. – Total Evaluated Price. No entry is required for Worksheet 4—only verification and validation of accuracy. This worksheet is pulling the Service Type#1 total from Worksheet 3, Row 18, Column AR. The total evaluated price used for evaluation adds Row 2, Column A to Column B to generate Column C. Offerors are urged to ensure their pricing is complete and accurate.

3.4.2 If needed, offerors will provide Price Assumptions at Tab 2 of the IV Price Volume. The document will be created by the offeror and will be included in this volume.

List of Attachments: The following list of attachments is provided at the end of this section:

1. Contractor Teaming/Organization Structure
2. Technical Self Scoring Worksheet (separate Excel File)
3. Pricing Template (separate Excel File)
4. Past Performance Tool
5. Past Performance Questionnaire
6. Subcontractor/Teaming Partner Consent Letter
7. Client Authorization Letter
8. Pricing Performance Work Statement (separate pdf file)

>END ADDENDUM to 52.212-1<

## ATTACHMENT 1

### Teaming/Organizational Structure ATTACHMENT 1: TEAM COMPOSITION WORKSHEET

1. Provide the required information on the offeror (Prime) below. If the offeror is a Joint Venture, list the name of the Joint Venture on the first line and provide the details for the two (2) companies forming the Joint Venture on the other two lines.

OFFEROR (Prime) COMPANY NAME	Small Business Designation	PSC Code	DUNS Number	ADDRESS	POC & TELEPHONE	PERCENTAGE OF CONTRACT WORKLOAD	Proposed Performance Location(s)* (list states)

*Note: Total prime workload must be greater than or equal to 50% of contract workload.*

2. Provide the requested information on all teaming partners/subcontractors. If more space is needed, use an additional copy of this sheet and number accordingly (i.e., Page 1 of 2).

Subcontractor's COMPANY NAME	Small Business Designation, if applicable	PSC Code	DUNS Number	ADDRESS	POC & TELEPHONE	PERCENTAGE OF CONTRACT WORKLOAD	Proposed Performance Location(s)* (list states)

*Note: Total teaming Partner/subcontractor workload must be less than or equal to 50% of contract workload.*

**\*This refers to states where the company will perform Medical Support Services under this solicitation.**

**ATTACHMENT 2**

**Technical Self-Scoring Worksheet**

**Provided separately in Excel format**

**ATTACHMENT 3**

**Pricing Template**

**Provided separately in Excel format**



## ATTACHMENT 4

### PAST PERFORMANCE INFORMATION (PPI) TOOL

Offerors must use the PPI Tool (Use latest version from FBO.gov) in order to electronically submit the PPI portion of the Past Performance Volume in accordance with the RFP.

#### Downloading the PPI Tool

The PPI Tool can be downloaded by performing the following steps (if you are unable to download the Tool, contact the contracting officer for assistance):

1. Access the FedBizOpps (<https://www.fbo.gov/>) website.
2. Find the solicitation posting.
3. Locate the “ppi tool” link [ppi tool.accdb](#) from the “All Files” column **ALL FILES** on the solicitation’s “Notice Details” tab **Notice Details**.
4. Select the link and save the “ppi tool” to your computer. Name the file as the prime contractor + RFP number + file extension (e.g. XYZCompanyHT001517R007.accdb).

**Note:** PPI Tools saved in Microsoft Office versions 2007 and greater will be saved with “.accdb” file extension.

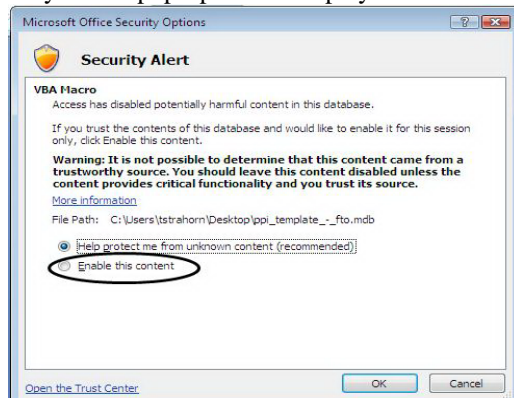
#### Entering information in the PPI Tool

After selecting and saving the tool, enter information by performing the following steps:

1. Open the saved PPI Tool.
2. Select the “Options” button from the “Security Warning” banner, if

applicable.

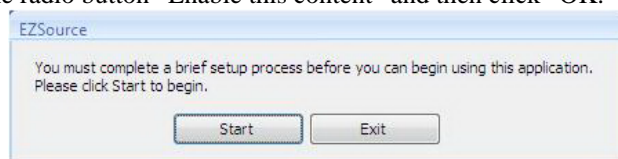
3. The “Security Alert” pop-up screen displays.



**Figure 1: Security Alert Pop-up**

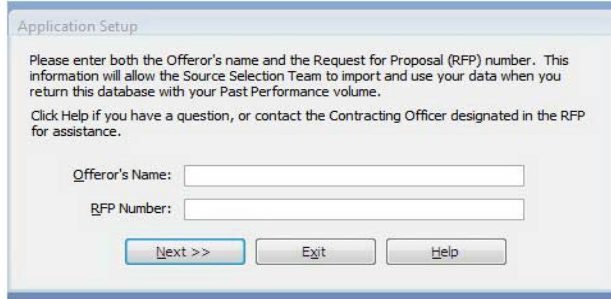
#### Note:

- Files saved using Microsoft Office 2010 will have the “Enable Content” button on the “Security Warning” banner and therefore will not get a Security Alert pop-up.
  - If a “read only” file is opened, in order to populate data in the file, click “Save As” in the “Read-Only” message bar. Enter the filename as the prime contractor + RFP number + file extension (e.g. XYZCompanyHT001517R0007.accdb).
4. Select the radio button “Enable this content” and then click “OK.” A setup pop-up screen displays.



**Figure 2: Setup Pop-Up**

5. Select the “Start” button. The “Application Setup” screen displays.

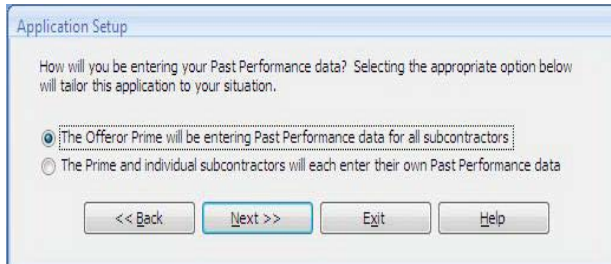


The "Application Setup" window has a title bar with the text "Application Setup". Inside, it contains the following text: "Please enter both the Offeror's name and the Request for Proposal (RFP) number. This information will allow the Source Selection Team to import and use your data when you return this database with your Past Performance volume. Click Help if you have a question, or contact the Contracting Officer designated in the RFP for assistance." Below this text are two input fields: "Offeror's Name:" and "RFP Number:". At the bottom are three buttons: "Next >>", "Exit", and "Help".

**Figure 3: Application Setup Screen**

Note: Once the Offeror's Name and RFP Number have been entered they can be edited by selecting the “Edit Offeror And RFP Number” button from the “Contractor's Menu”

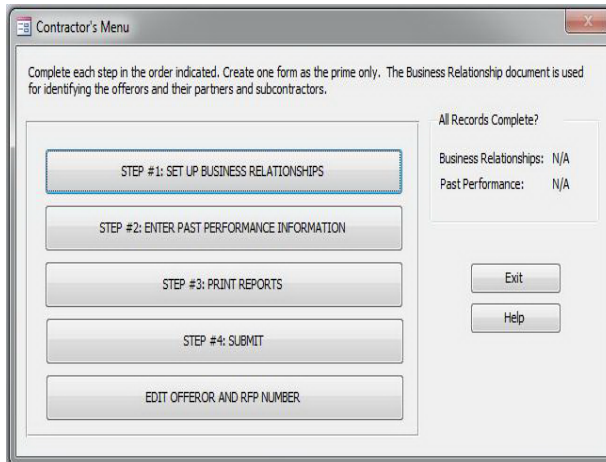
6. Enter the Offeror's Name and RFP Number and then click the “Next” button. The application setup continues.



The "Continue the Application Setup" window has a title bar with the text "Application Setup". Inside, it contains the following text: "How will you be entering your Past Performance data? Selecting the appropriate option below will tailor this application to your situation." Below this text are two radio button options: "The Offeror Prime will be entering Past Performance data for all subcontractors" (which is selected) and "The Prime and individual subcontractors will each enter their own Past Performance data". At the bottom are four buttons: "<< Back", "Next >>", "Exit", and "Help".

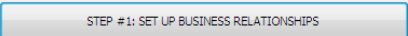
**Figure 4: Continue the Application Setup**

7. Choose the appropriate option by selecting the corresponding radio button and then click the “Next” button. The “Contractor's Menu” displays.



The "Contractor's Menu" window has a title bar with the text "Contractor's Menu". Inside, it contains the following text: "Complete each step in the order indicated. Create one form as the prime only. The Business Relationship document is used for identifying the offerors and their partners and subcontractors." Below this text are five buttons arranged vertically: "STEP #1: SET UP BUSINESS RELATIONSHIPS", "STEP #2: ENTER PAST PERFORMANCE INFORMATION", "STEP #3: PRINT REPORTS", "STEP #4: SUBMIT", and "EDIT OFFEROR AND RFP NUMBER". On the right side, there is a section titled "All Records Complete?" with the following text: "Business Relationships: N/A" and "Past Performance: N/A". At the bottom right are two buttons: "Exit" and "Help".

**Figure 5: Contractor's Menu**

8. Click the “Step 1: Set up Business Relationships” button  to create a business relationship, if applicable, for each business entity before proceeding throughout the PPI Tool (refer to Section L of the RFP for detailed instructions). Identify all prime and sub-prime organizations identified in Attachment 4, Contractor Team Organization and categorize them according to the appropriate role in the proposed acquisition. The “Business Relationships” screen displays.

Business Relationships

Click New to add a new Business Relationship. Double-click an item from the list to edit/delete an existing Business Relationship.

Sort By: Offeror's Name

COMPLETE	OFFEROR'S NAME	CONTRACTOR'S NAME	ROLE	% WORK	PLACE OF WORK
----------	----------------	-------------------	------	--------	---------------

New Close Help

**Figure 6: Business Relationships**

9. Click the “New” button to create a business relationship for the proposed acquisition. An additional “Business Relationships” screen displays.

Business Relationships

Enter the information for the proposed acquisition for the contractor who will be filling out the Past Performance Sheets. This form will allow you to add an incomplete record, but all fields marked with an asterisk (\*) are required for final submission.

\*Contractor's Name:

\*Role in Proposed Acquisition  
☒ Prime ☐ Sub ☐ Joint Venture ☐ Other (Explain):

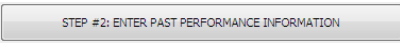
\*Place of Work:

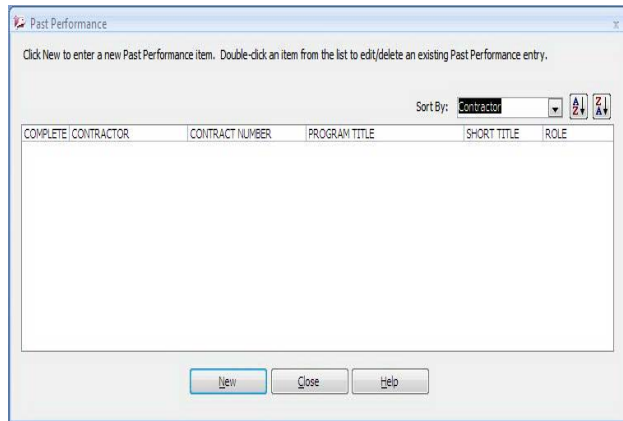
Percentage of Work:  %

\*Responsibilities:

Add Close Delete Help

**Figure 7: Enter New Business Relationship**

10. Complete the fields as follows (fields marked on the screen with an asterisk “\*” are required):
- Contractor’s Name: Self-explanatory
  - Role in Proposed Acquisition: Choose one of the four options – Prime, Sub, Joint Venture, or Other (Explain). An explanation comment box will display when you select “Other.”
  - Place of Work: Location where contractor will perform work.
  - Percentage of Work: Identify percentage of work contributed by specified business entity
  - Responsibilities: Detail proposed responsibilities of specified business entity.
11. Select one of the buttons at the bottom of the screen.
- Add – Saves the current business relationship and allows for the addition of a new one.
  - Close – Cancels the current business relationship without saving.
- Note:** In order to edit or delete an existing business relationship in the list, double-click on it.
12. Select the “Close” button on the “Business Relationships” screen after all of the business relationships has been added.
13. Click the “Step 2: Enter Past Performance Information (PPI)” button  to enter the Past Performance Information. The “Past Performance” screen displays.



**Figure 8: Past Performance**

14. Click the “New” button to enter Past Performance Information for the proposed acquisition. An additional “Past Performance” screen displays.

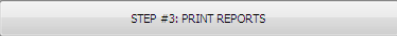
**Figure 9: Enter Past Performance Information**

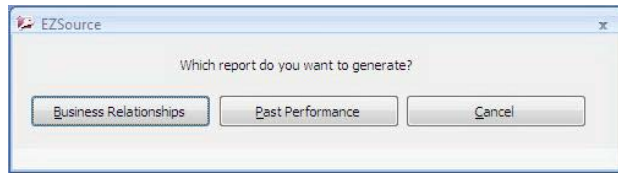
15. Complete the fields on each of the tabs as follows (fields on the screen marked with an asterisk ‘\*’ are required):
- **Contract Information Tab**
    - ❖ **Contractor:** Select from the dropdown the appropriate business entity.
    - ❖ **Cage Code:** Self-explanatory.
    - ❖ **Contract Number.**
    - ❖ **Program Title:** Enter full name of program.
    - ❖ **Contr Agency/Customer:** Enter servicing contracting agency and customer (office symbols suffice).
    - ❖ **DUNS Number:** Self-explanatory
    - ❖ **Delivery Task/Order:** If the order is provided as a stand-alone reference, enter the task/call/delivery/purchase order number.
    - ❖ **Contract Type:** Enter Firm-Fixed-Price (FFP), Cost Plus Fixed-Fee (CPFF), Indefinite Delivery/Indefinite Quantity (ID/IQ), LH, Blanket Purchase Agreement (BPA), Cost Plus Incentive-Fee (CPIF), Cost Plus Award Fee (CPAF), etc. For additional clarification, click the question mark button.
    - ❖ **Short Program Title (i.e. Acronym):** Enter abbreviated title for the program or enter “N/A.”
    - ❖ **Contract Dollar Value:**
      - **Original:** Input total contract dollar value, with all options if applicable, in the amount originally awarded on the referenced contract.
        - If ID/IQ or BPA, provide total ceiling.
        - If stand-alone task/call/delivery/purchase, provide amount of the individual contract.

- Current: Input total contract dollar value, with all options if applicable, as the contract stands at time of PPI submission.
    - If ID/IQ or BPA, provide total ceiling.
    - If stand-alone task/call/delivery/purchase, provide amount of the individual contract.
  - Explain the differences in Contract Value, if applicable: Enter an explanation of the difference between the original contract dollar value and the revised value as of the time of PPI submission.
- ❖ Period of Performance (mm/dd/yy)
- Start Date: Input start date of contract.
  - Original End Date: Input original end date based on award.
  - Current End Date: Input end date, as the contract stands at time of PPI submission.
  - Explain the differences in Period of Performance, if applicable: Enter an explanation of the difference between “Original End Date” and “Current End Date.”
- Program Details Tab
- ❖ Brief Description of Effort as:
- Select Prime, Sub, Joint Venture, or Other (Explain). An explanation comment box will display when you select “Other.”
  - Provide a brief description of the service provided and actual work performed under this contract reference.
  - \*\*\*\*If applicable: Provide information on performance problems encountered on the identified contracts. At a minimum, briefly describe the problem experienced, actions taken to alleviate the problem, and whether or not the problem was satisfactorily overcome.\*\*\*\*
- ❖ Explain how your performance on this contract is relevant for each market segment as described in Table 4 from Section 52.212-2 of the RFP. Include any unique aspects that demonstrate relevancy in this effort.
- POC & Key Individuals Tab
- ❖ Key Individuals: Not required.
- ❖ Customer Points of Contact: Click the “Program Manager,” “Contracting Officer” or “Admin POC” button for the point of contact that you would like to add, edit, or delete.  
**Note:** For government contracts provide current information on Program Manager, Contracting Officer, and Admin POC, if available.  
 For commercial contracts provide points of contact fulfilling these same roles, if available.
16. Select from the buttons at the bottom of the Past Performance screen:
- Save – Saves the Past Performance Information and displays the “Contract Information” tab on the Past Performance screen.
  - Close – Closes the Past Performance screen. If there were any updates, a pop-up window displays asking to save before closing.
  - Delete – Deletes the current PPI record. A pop-up window displays, select “Yes” to delete the record or “No” to close the window without deleting the record.
- Note:** In order to edit or delete an existing PPI record in the list, double-click on it.
17. Select the “Close” button on the “Past Performance Information” screen after all of the PPI records have been added.

### Printing Reports and Submitting PPI Tool

The Offeror may either print PPI references to be saved on a DVD or save the PPI references as listed below:  
 In order to print the Business Relationships and PPI reports, perform the following steps:

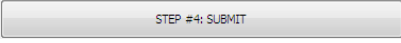
1. Click the “Step 3: Print Report” button . A pop-up displays asking which report to print.

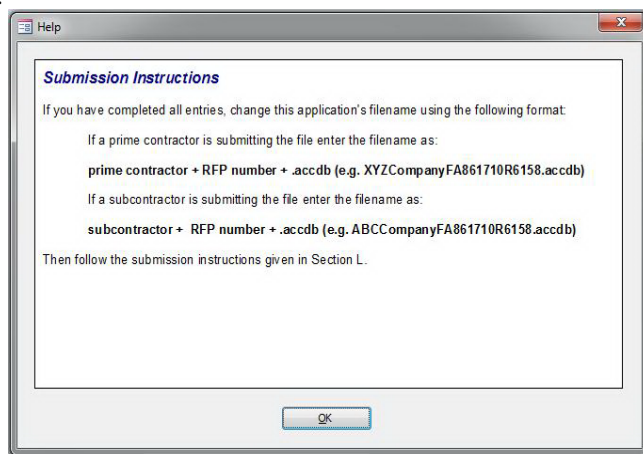


**Figure 10: Select Report to Print**

2. Select separately each of the two options, "Business Relationships" or "Past Performance." The Business Relationships and Past Performance documents will print separately. Hard copies of the pages generated from this tool shall be saved in a pdf format as outlined in this RFP for the Past Performance Volume folder on the DVD.

In order to save the Business Relationships and PPI, perform the following steps:

3. Click the "Step 4: Submit" button . The "Submission Instructions" screen displays.



**Figure 11: Submission Instructions**

4. Follow the submission instructions.

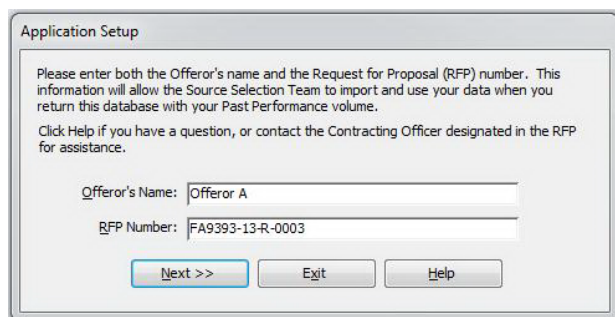
**Note:**

- Submit an electronic copy (e.g. DVD) of the saved PPI database file with your proposal. Submitting the file name as follows:
  - Contractor name + Volume number + Tab number (e.g. XYZCompanyVOLIIITAB1A.acddb)
- Once the file is saved to a DVD or any location that is marked as "Read-only," it must first be saved to the desktop in order to read/edit the file.

**Editing Offeror and RFP Number**

In order to edit the Offeror name and/or the RFP number identified during start-up, perform the following steps:

1. Click the "Edit Offeror and RFP Number" button . The "Application Setup" screen displays.



The image shows a software dialog box titled "Application Setup". It contains instructional text, two input fields, and three buttons. The text explains that the user must enter the Offeror's name and RFP number for data import. The "Offeror's Name" field contains "Offeror A" and the "RFP Number" field contains "FA9393-13-R-0003". The "Next >>" button is highlighted with a blue border, while "Exit" and "Help" are in grey.

**Application Setup**


Please enter both the Offeror's name and the Request for Proposal (RFP) number. This information will allow the Source Selection Team to import and use your data when you return this database with your Past Performance volume.

Click Help if you have a question, or contact the Contracting Officer designated in the RFP for assistance.

Offeror's Name:

RFP Number:

**Figure 12: Change Name and RFP Number - Application Setup**

2. Update the Offeror's name and/or RFP number.
3. Click the "Next" button  twice to return to the "Contractor's Menu".

**ATTACHMENT 5**  
**Past Performance Questionnaire**

**Medical Support Services Past Performance Questionnaire**

**Page 1 of 7**

*WHEN FILLED IN, THIS DOCUMENT IS SOURCE SELECTION SENSITIVE INFORMATION  
IAW FAR 2.101 AND 3.104*

**Offeror:** Complete SECTION 1, and send a questionnaire to the customer point of contact (POC) listed on the Past Performance Information Sheet for the contract. The primary customer is considered the individual most familiar with the contractor's performance of services at the duty location (end user). Only request a questionnaire if there is no official CPARS available for your contract/performance effort.

**Primary Customer POC:** Complete SECTIONS 2-5 and sign/date questionnaire. Questionnaires should be returned to the company for inclusion into their Volume III – Past Performance proposal. Handwritten responses are sufficient.

**SOLICITATION NUMBER:** HT0014-17-R-xxxx **OFFEROR:** \_\_\_\_\_

**SECTION 1: REFERENCE IDENTIFICATION**

A. Contractor			
B. Contractor Performed as	Prime Contractor	Subcontractor	
	Other (specify) _____		
Teaming Structure/Key Partners			
C. Contract Number (IAW M.6.2.4, single Reference for MAC, task orders, option periods; GSS or GSA are separate references)			
D. Contract Type			
E. Was this a competitive contract?	Yes		No

F. Period(s) of Performance (list all option periods, if applicable)	
G. Initial Contract Award Amount Total (\$)	
H. Current/Final Contract Cost Total (\$)	
I. Reasons for differences between initial and final contract costs (enter below):	

J. Description of service provided (enter below):

**SECTION 2: CUSTOMER OR AGENCY IDENTIFICATION (Page 2 of 7)**

A. Customer or Agency Name	
B. Customer or Agency Description (i.e., hospital)	



C. Geographic Performance Location under this contract, (i.e., local, nationwide, worldwide, other Command). List States where services were provided below:

**D. Provide number of full-time or part-time equivalent positions that were provided by the contract.**

**List Individual Positions** (fill out ONLY if providing personnel to a client)

**FTEs**

**PTEs**

**N/A**

Clerical labor categories (i.e., secretary, appointment clerk, office clerk)

Certified labor categories (i.e., medical coding professionals, transcriptionists, records technicians)

Specialized labor categories (i.e., beneficiary services/PEBLO, tumor registrars, referral management personnel, utilization managers, third party collection clerks)

Technical labor categories (i.e., logistics, supply, equipment technicians, public health, safety specialists)

Other labor categories (list them below)

**Full Operational Activities** (fill out ONLY if contractor perform an entire service i.e., staffing, operational planning, personnel management, reporting & corrective actions).

**FTEs**

**PTEs**

**N/A**

Patient Appointing Service

Medical Records Service

Medical Coding & Auditing Service

Medical Transcription Service

Referral Management Service

### SECTION 3: EVALUATOR IDENTIFICATION (Page 3 of 7)

A. Evaluator's Name

B. Evaluator's Title

C. Evaluator's Phone/Fax Number

D. Evaluator's Mailing Address

E. Number of years evaluator worked on subject contract

### SECTION 4: EVALUATION

Please confirm that your evaluation is consistent with the description of service provided in Section 1, Paragraph J on Page 1 of the survey. Indicate compliance of the contractor's performance by placing an "X" in either YES or NO blocks. Indicate your satisfaction is the overall evaluation using the scale provided below:

CODE	PERFORMANCE LEVEL
<b>E</b>	<b>EXCEPTIONAL</b> – The contractor's performance meets contractual requirements and consistently exceeds many. Very few, if any, minor problems were encountered. Contractor took immediate and effective corrective action.
<b>V</b>	<b>VERY GOOD</b> – The contractor's performance meets contractual requirements and consistently exceeds some. Some minor problems encountered. Contractor took effective and timely corrective action.
<b>S</b>	<b>SATISFACTORY</b> – The contractor's performance meets contractual requirements. For any problems encountered, the contractor took effective and timely corrective action.

<b>M</b>	<b>MARGINAL</b> – The contractor’s performance does not meet some contractual requirements. For problems encountered, corrective action appeared only marginally effective, not effective or not fully implemented. Customer involvement was required.					
<b>U</b>	<b>UNSATISFACTORY</b> – The contractor’s performance does not meet most contract requirements. Serious problem(s) encountered. Corrected actions were either ineffective or non-existent. Extensive customer oversight and involvement was required.					
<b>N</b>	<b>NOT APPLICABLE</b> – Unable to provide a rating. Contract did not include performance aspect.					
<b>Business Plan</b>			<b>YES</b>	<b>NO</b>	<b>N/A</b>	
Demonstrated the ability and willingness to perform requirements for the customer.						
Effectively integrated business practices over geographic range and scope of requirements.						
Managed teaming partners/subcontractors on this contract.						
Implemented sound strategies and contingency plans to safeguard service delivery.						
<b>Business Plan rating for business approach and teaming structure. (CIRCLE ONE)</b>			<b>E</b>	<b>V</b>	<b>S</b>	<b>M U N</b>
<b>SECTION 4: EVALUATION (continued) (Page 5 of 7)</b>						
<b>HUMAN RESOURCE MANAGEMENT PLAN</b>			<b>YES</b>	<b>NO</b>	<b>N/A</b>	
Demonstrated a strong recruiting methodology, market knowledge and personnel selection process.						
Demonstrated ability to hire and place fully qualified personnel (meeting all education, experience, as well as health and certification requirements) within contracted timeframes.						
Demonstrated ability to replace personnel due to planned/unplanned absences or vacancies within the contracted timeframes.						
Demonstrated ability to provide personnel that comply with DoD security requirements and are educated about the military healthcare system.						
Demonstrated ability to provide trained personnel on DoD computer systems (CHCS/AHLTA), and position requirements.						
Managed a qualified workforce and demonstrated day-to-day employee oversight and corporate requirements such as absenteeism, time and attendance, continued education, and appraisals.						
<b>Human Resource Management rating for recruiting, training, qualifying and personnel management. (CIRCLE ONE)</b>			<b>E</b>	<b>V</b>	<b>S</b>	<b>M U N</b>
<b>Performance Management Plan</b>			<b>Yes</b>	<b>No</b>	<b>N/A</b>	
Assess employee performance to ensure compliance with performance standards.						
Demonstrated a customer satisfaction process and an ability to resolve issues or complaints in a timely manner.						
Demonstrated the ability to maintain a stable workforce with minimal turnover of personnel and an overall fill rate of at least 95% annually.						
Complied with contract terms and conditions specific to contract bid rates.						
Monitored and reported performance measures; provided contract deliverables on time.						
<b>Performance Management rating for delivery of quality services, customer satisfaction, maintaining a stable workforce, compliance with price thresholds and monitoring and report activities. (CIRCLE ONE)</b>			<b>E</b>	<b>V</b>	<b>S</b>	<b>M U N</b>
<b>Overall contract performance rating. (CIRCLE ONE)</b>						
<b>Exceptional</b>		<b>Very Good</b>	<b>Satisfactory</b>	<b>Marginal</b>	<b>Unsatisfactory</b>	<b>N/A</b>
<b>SECTION 4: EVALUATION (continued) (Page 6 of 7)</b>						
Please discuss each response for any question or rating which you indicated Marginal, Unsatisfactory or Not Applicable in response to the questions above (use additional sheets, if necessary).						
<b>Government Contracts Only:</b> Has/was this contract been partially or completely terminated for default,						

convenience, or are there any pending terminations?

Yes

☐

No

☐

Default

☐

Convenience

☐

Pending Terminations

☐

If yes, please explain below (e.g., inability to meet cost, performance, or delivery schedules, etc).

### SECTION 5: NARRATIVE SUMMARY (Page 7 of 7)

What were the contractor's greatest strengths in the performance of the contract?

What were the contractor's greatest weaknesses in the performance of the contract?

Would you have any reservations about soliciting this contractor in the future or having them perform one of your critical and demanding programs?

Please provide any additional comments concerning this contractor's performance, as desired. Use a separate sheet if necessary.

Evaluator's Printed Name/Title

Evaluator's Signature/Date

**ATTACHMENT 6**  
**Subcontractor/Teaming Partner Consent Letter**

Note: Past performance information concerning subcontractors and teaming partners cannot be disclosed to a private party without the subcontractor's or teaming partner's consent. Because a prime Contractor is a private party, the Government will need that consent before disclosing subcontractor/teaming partner past and present performance information to the prime Contractor during exchanges. In an effort to assist the Government's Performance Confidence Assessment Group (PCAG) in assessing your past performance relevancy and confidence, we request that a consent letter (similar to the sample below) be completed by the major subcontractors/teaming partners identified in Contractor Teaming/Organization Structure (Attachment 1), in your proposal. The completed consent letters should be submitted as part of your Past Performance Volume.

SAMPLE

Dear "Contracting Officer:"

We are participating as a (subcontractor/teaming partner) with (prime Contractor or name of entity providing proposal) in responding to the Defense Health Agency, Request for Proposal for a Medical Support Services (MSS) contract.

We understand that the Government is placing increased emphasis on past performance in order to obtain best value in source selections. In order to facilitate the performance confidence assessment process we are signing this consent letter to allow you to discuss our past and present performance information with the prime Contractor during the source selection process.

\_\_\_\_\_  
 \_\_\_\_\_

(Signature and title of individual who has the authority to sign for and legally bind the company)

Company Name:

Address:

Telephone Number:

**ATTACHMENT 7****Client Authorization Letter**

Note: Past performance information concerning private sector Contractors, subcontractors and joint venture partners cannot be disclosed to the government without their consent. Client authorization letters are required for each identified effort of a commercial customer. This letter will authorize release to the Government of requested information on the Offeror's performance. The government will need that consent before contacting commercial customers to assess the Offeror's past performance. In an effort to assist the Government's Performance Confidence Assessment Group (PCAG) in assessing your past performance relevancy and confidence, we request that a client authorization letter (similar to sample below) be completed for any commercial customers identified in your proposal. The completed client authorization letters should be submitted as part of your Past Performance Volume.

**Sample**

Dear "Client:"

We are responding to a Defense Health Agency Request for Proposal for a Medical Support Services (MSS) contract.

In their acquisitions, the Government is placing increased emphasis on past performance as a source selection factor. They are requiring those clients of entities responding to their solicitation to be identified, and their participation in the evaluation process is requested. In the event that you are contacted for information on work performed, you are hereby authorized to respond to those inquiries.

We have identified Mr./Ms. \_\_\_\_\_ of your organization as the point of contact based on his/her knowledge of our work. Your cooperation is appreciated. Any questions may be directed to *[Add Company Name, Address, and Telephone Number]*

Sincerely,

## **ATTACHMENT 8**

### **Pricing Performance Work Statement**

(Provided separately in pdf format)

#### **ADDENDUM TO FAR 52.212-1**

#### **PROGRAM STRUCTURE AND OBJECTIVES**

- e. The resulting contracts from this acquisition will be Indefinite Delivery/Indefinite Quantity (IDIQ) Multiple Award Contracts (MACs). This requirement is 100% small business set-aside under North American Industry Classification System (NAICS) number 621999. The Government anticipates awarding approximately 20 IDIQ contracts.
- f. All referenced documents for this solicitation are available on the Federal Business Opportunities (FedBizOpps) web site at <http://www.fbo.gov> under the Solicitation Number HT0014-17-R-0010 Potential offerors are encouraged to subscribe for real-time e-mail notifications when information has been posted to the website for this solicitation.
- g. Market research confirmed that subcontracting and teaming arrangements are necessary because of the broad scope of the contract requirements; therefore such arrangements are encouraged to ensure mission success. However, during the contract competition, if a company is identified as a prime contractor or teaming partner/subcontractor on any proposal for this acquisition, then they cannot participate as a prime contractor or teaming partner/subcontractor on any other offeror's proposal(s). This limitation includes the companies of mentor protégé arrangements and joint venture partners. After award of contracts, for subsequent task order competitions, the government continues to prohibit cross-teaming.
- h. For consideration in developing a proposal, the maximum program size is \$969M over a five year ordering period. The Government will award each contract the total maximum program size, allowing the ordering Services to expend program funds on a task order by task order fair opportunity basis as specified in Part 1, Paragraph 1.2 (Subsequent Task Orders). However, since this contract is an ID/IQ-ordering vehicle, the Government does not guarantee the contract holders any awards above the minimum contract award outlined in Part 1, Paragraph 1.9 (Post Award Conference). Congressional budget year allocations and prioritized requirements may drive future task order awards and exercise of task order options.

## 2. GENERAL INSTRUCTIONS

c. This section provides guidance for preparing proposals as well as specific instructions on the format and content of the proposal. Offerors are required to meet all solicitation requirements, including terms and conditions, representations and certifications, and technical requirements, in addition to those identified as evaluation factors or subfactors. Non-conformance with the instructions may result in an unfavorable proposal evaluation.

d. The Contracting Officer (KO) is the sole point of contact for this acquisition. The KO for this acquisition is as follows:

Ms. Hanika Torio  
8111 Gatehouse Road  
Falls Church, VA 22042  
(703) 275-6371  
E-mail: [hanika.j.torio.civ@mail.mil](mailto:hanika.j.torio.civ@mail.mil)

(4) E-mail is the preferred method of communication. The KO will control exchanges of source selection information between Government and offerors. The Government may use email to transmit such information to offerors only if they are encrypted and includes "Source Selection Information – See FAR 2.101 & 3.104." in the Subject line along with the Solicitation Number HT0014-17-R-0010. Otherwise, the Government will transmit source selection information via fax. Offerors may send questions via e-mail to both the KO [hanika.j.torio.civ@mail.mil](mailto:hanika.j.torio.civ@mail.mil) and the CS [john.a.cowgill4.ctr@mail.mil](mailto:john.a.cowgill4.ctr@mail.mil); however, no proposals will be accepted via email or fax.

(5) Offerors who determine that the technical requirements of this RFP require clarification(s) in order to permit submittal of a responsive proposal are requested to submit all questions in writing on or before 26 July 2017. These questions shall be directed to the KO and CS identified above. The Government will issue RFP Questions and Answers on fbo.gov and amend the RFP if required to clarify RFP requirements.

The deadline for questions in response to Government-issued RFP as amended is 21 August 2017 at 2 p.m. EDT. Offerors are instructed to email questions to John Cowgill [john.a.cowgill4.ctr@mail.mil](mailto:john.a.cowgill4.ctr@mail.mil) and Hanika Torio [hanika.j.torio.civ@mail.mil](mailto:hanika.j.torio.civ@mail.mil).

(6) If discussions are held, the KO will promptly notify offerors of any decision to exclude them from the competitive range; whereupon, offerors may request and receive a debriefing in accordance with FAR 15.505. Offerors excluded from the competitive range may request a pre-award debriefing or may choose to wait until after the source selection decision to request a post-award debriefing. However, offerors excluded from the competitive range are entitled to no more than one debriefing for each proposal. The KO will notify unsuccessful offerors in the competitive range of the source selection decision in accordance with FAR 15.506. Upon such notification, unsuccessful offerors may request and receive a debriefing. Offerors desiring a debriefing must make their request in accordance with the requirements of FAR 15.505 or 15.506, as applicable.

e. Elaborate formats, or color presentations are not desired or required. Offeror may only include corporate logos in Volume I – Administration.

f. Oral presentations will not be considered for this competitive acquisition.

g. Proprietary information shall be clearly marked. Proprietary information submitted in response to this solicitation will be protected from unauthorized disclosure as required by Subsection 27 of the Office of Procurement Policy Act as amended (41 U.S.C. 423), hereinafter referred to as "the Act", as implemented in the FAR.

h. The Government requires an electronic proposal submission with the offeror's entire proposal loaded on a single DVD-R (Digital Versatile Disk – Recordable). The Government does not require any paper proposals. Due to mailbox constraints, offerors may not submit proposals to the Government via e-mail; faxed copies are also not authorized. The disk shall be labeled with the Company Name, the Solicitation Number and date submitted to the Government. As a minimum, each volume must be in a different directory (folder) on the disk. Offerors shall include separate files with the required naming conventions in accordance with Table 1 below. All documents shall be submitted in portable document format (PDF) format that is created to be searched and copied with the EXCEPTION of the unique files in the Government specified format (See Table 1). DO NOT submit any documents in PDF format that are copied as "images." The offeror's documents/files will be provided in a non-compressed format. It is the sole responsibility of the Offeror to ensure that the electronic files submitted are virus free.

(4) Offerors must send their electronic proposal disk by United State Postal Service, FedEx or United Parcel Service or hand delivered to Hanika Torio, C/O David Green, Defense Health Agency, 2776 C Street, Area B, Building 6, Suite 200, Wright-Patterson AFB, OH 45433. Pre-arrangement for hand delivery is required. Email Mr. David Green at david.d.green7.civ@mail.mil for arrangements NLT 7:00 AM Eastern time on 5 Sep 2017, if hand delivery is required." It is the Offeror's responsibility to make those arrangements to assure meeting the proposal deadline. If the Offeror decides to mail the proposal, it is the Offeror's responsibility to assure the correct address and to meet the proposal deadlines. The government will not accept late proposals even if due to third party shipping delays. Proposals received after the due date and time specified herein will be considered late, will not be evaluated and will be deemed ineligible for award.

(5) Offerors shall not lock, encrypt, copy as an image, password protect or otherwise place barriers to opening files for their proposal submissions. In the event where the Government cannot access the electronic version to complete evaluation, the government will consider the offer invalid and the proposal will be deemed ineligible for award.

(6) If the Government receives more than one DVD-R from an Offeror, the proposal will be deemed invalid, will not be evaluated and will be deemed ineligible for award.

i. All proposal information is subject to verification by the Government. The documentation must be in the Offeror's name as submitted in Block 17a of the Standard Form (SF) 1449, Solicitation/Contract/Order for Commercial Items, with a corresponding Cage Code and DUNS Number. Offerors shall assume that the Government has no prior knowledge of their operation and will rely on documentation provided as part of the Offeror's proposal. By signing the SF 1449, the Offeror acknowledges that the terms and conditions of the proposals are valid for a minimum of 180 calendar days after the proposal due date in Block 8.

j. Files shall not contain classified data and must adhere to the page limitations in Table 1. The Government will not read and evaluation pages that exceed any limitation identified in Table 1, Proposal Organization. For this document, an electronic page is identified as follows:

- Page: One face of a 8.5" x 11" sheet of paper containing information
- Paragraph: Separated by at least one blank line
- Page Numbering: Sequentially
- Font: Times New Roman Font; 12-point minimum font size
- Margins: Top, Bottom, Left, Right shall be 1"
- Tables graphs and illustrations: Font size no less than 8 point
- Page layout: Orientation may be portrait or landscape

k. The following documents are limited to the Government specified format and remain in the template format (Save files in default format (e.g., Word Document – Set "save as type" to "Word Document [\*.docx]" only and Excel spreadsheets – Set "save as type" to "Microsoft Excel Workbook [\*.xlsx]").

- SF1449 and all Amendments (SF 30)
- Team/Organizational Structure (Attachment 1)



- Technical Self Scoring Worksheet (Attachment 2)
- Pricing Template (Attachment 3)
- Past Performance Information (PPI) Tool (Attachment 4)
- Past Performance Questionnaire (Attachment 5)

n. Representations and Certifications: Offerors shall ensure that their registration in the System for Award Management (SAM) database is current, complete, and applicable to this solicitation. The Contracting Officer will check SAM and document the contract file.

o. Cross-referencing: Each volume shall be written on a standalone basis so that its contents may be evaluated with no requirement to cross-reference to other volumes of the proposal. Information required for proposal evaluation which is not found in its designated volume will be assumed to have been omitted from the proposal. Offerors are responsible for the accuracy of their proposals and the Government will not search for information that is not provided in the required Volume.

n. Award without Discussions: It is the Government's intent to award without discussions. Therefore, each initial proposal should contain the offeror's best effort to demonstrate technical, past performance and price. However, the Government reserves the right to conduct discussions if the Contracting Officer determines that discussions are necessary.

o. Clarifications: Offerors are cautioned to submit sufficient information and in the format specified in instructions. Offerors may be asked to clarify certain aspects of the proposal (for example, the relevance of past performance information) or to respond to adverse past performance information to which the offerors have not previously had an opportunity to respond. Communication conducted to resolve minor or clerical errors will not constitute discussions and the contracting officer reserves the right to award a contract(s) without the opportunity for proposal revision.

### 3. PROPOSAL ORGANIZATION

c. The Offeror shall organize the proposal as set forth in Table 1, Proposal Organization and subsequent detailed supporting documentation provided in proposal tabs. In accordance with Paragraph 2.h, electronic proposals are required. The Offeror shall organize their proposal by Volume and submit the proposal on a single disk with four (4) separate electronic folders, labeled by volume number and title, as follows:

Volume I – Contract Administration  
 Volume II – Technical Capability  
 Volume III – Past Performance  
 Volume IV – Price

d. Within each of the four (4) folders, offerors will submit the required information, electronic documents or supporting materials per Table 1 below. Offerors must include their company name and volume number as shown in the filename of each document. An example is shown in Table 1. For example, ABC Incorporated filename for Volume II, Scope supporting documentation would be: ABC.VOLII.TAB2A.pdf. (Filenames do not have to be capitalized). Offerors may make minor adjustments to the file naming methodology so long as the resulting file names and organization are clearly understandable. Offerors should plan on submitting a single file for each item versus multiple files.

**Table 1 - Proposal Organization**

Para	Volume	Title	Page Limit	File Name Example *see 3.b above
6	I	Tab 1 – SF 1449 and all Amendments (SF 30) signed by an authorized representative Tab 2 – Company Information	No page limit	ABC.VOLI.TAB1  ABC.VOLI.TAB2

		Tab2a – Authorized Offeror Personnel Tab 2b – Company address, Identifying codes and Designations Tab 2c - Teaming/Organization Structure (Attachment 1) Tab 3 – Exceptions to Solicitation Requirements Tab 4 – Certifications and Representations Tab 5 – Letter of Credit Tab 6 – Master Table of Contents Tab 7 – Glossary of Abbreviations and Acronyms		ABC.VOLI.TAB2a ABC.VOLI.TAB2b ABC.VOLI.TAB2c ABC.VOLI.TAB3 ABC.VOLI.TAB4 ABC.VOLI.TAB5 ABC.VOLI.TAB6 ABC.VOLI.TAB7
7	II	Completed Self Scoring Technical Capability Worksheet (Attachment 2) Tabs 1 through 11 are supporting documentation (as applicable) Tab 1a through 1e 2– Scope (LC & SVC) Tab 2a through 2f – Scope (Hard to Fill/Turnover) Tab 3a and 3b – Scope (Healthcare setting) Tab 4a– Magnitude ( Highest contract value) Tab 4b – Magnitude (Total FTEs in 5 years) Tab 4c – Magnitude (Total Contracts) Tab 5a through i –Complexity (locations) Tab 6a through e – Complexity (hard locations) Tab 7a and b – Complexity (Prime Experience) Tab 8 – Complexity (subcontractor management) Tab 9a through e – Applicability (Customers) Tab 10a - Applicability (IDIQ experience) Tab 11a - Applicability (FFP experience) Tab 12 – Teaming/Organizational Structure (Attachment 1)	Tab WKSHT limited to 4 Pages in Government-provided template.  Tabs 1through 11 are supporting documentation (see instructions below); each supporting documentation file is limited to 10 Pages with the exception of the Magnitude tabs which is 40 pages.	ABC.VOLII.WKSHT ABC.VOLII.TAB1* ABC.VOLII.TAB2* ABC.VOLII.TAB3* ABC.VOLII.TAB4a ABC.VOLII.TAB4b ABC.VOLII.TAB4c ABC.VOLII.TAB5 Etc.
8	III <sup>1</sup>	Tab 1A – Prime Reference 1 Tab 1B – Prime Reference 2 Tab 1C – Prime Reference 3 Tab 2A – Teaming Partner (highest % of planned work) Reference 1 Tab 2B – Teaming Partner (second highest % of planned work) Reference 2 Tab 2C – Teaming Partner (third %...) Reference 3 Tab 2D - Teaming Partner (fourth %...) Reference 4 Tab 2E - Teaming Partner (fifth %...) Reference 5 Tab 3 – Organization Change History Tab 4 – Teaming/Organizational Structure (Attachment 1)	Page limited to past performance information (PPI) tool; Page limit of Organizational Change History: 5 pages; Contractor Teaming Structure: Government template	ABC.VOLIII.TAB1A ABC.VOLIII.TAB1B ABC.VOLIII.TAB1C ABC.VOLIII.TAB2A ABC.VOLIII.TAB2B ABC.VOLIII.TAB2C ABC.VOLIII.TAB2D ABC.VOLIII.TAB2E ABC.VOLIII.TAB3 ABC.VOLIII.TAB4
9	IV – Price	Tab 1 – Completed Government Pricing Template (saved in Excel) (Attachment 3) Tab 2 – Price Assumptions	No page limit: Government template	ABC.VOLIV.TAB1

<sup>1</sup> A complete past performance reference consists of:

5. Past performance information sheet printed from PPI tool (Attachment 4)
6. Past Performance Questionnaire, if required (Attachment 5)
7. Consent letter, if required (Attachment 6)
8. Client authorization letter, if required (Attachment 7)

### 3.1 Volume I – Contract Administration

In this volume of the proposal, the offeror shall provide the following information:

**Tab 1 - Standard Form (SF) 1449, SOLICITATION/CONTRACT/ORDER FOR COMMERCIAL ITEMS and SF 30, AMENDMENT OF SOLICITATION/ MODIFICATION OF CONTRACT:** Complete blocks 12, 17a, 17b (if applicable), 23, 24, 30a, 30b, and 30c of the RFP Section A, SF 1449. In doing so, the offeror accedes to the contract terms and conditions as written in the RFP Sections A through K. These sections constitute the model contract. The SF 1449 shall be provided in Volume 1. If the solicitation is amended, for each issued amendment, complete blocks 8, 15A, 15B and 15C of the SF 30, and include in this section of the proposal.

The government recommends that offerors also consider the requirements above in Paragraph 2.b.(i).

**Tab 2 - Company Information:**

b. Authorized Offeror Personnel. Provide the name, title, and telephone number of the company/division point of contact regarding decisions made with respect to your proposal and who can obligate your company contractually. Also, identify those individuals authorized to negotiate with the Government. Additionally, provide the name, title, and telephone number of the CEO, Division President, and/or Vice President of the company for notification purposes.

b. Company/Division Address, Identifying Codes, and Applicable Designations. Provide company/division's street address and county; CAGE code; DUNS code; and TIN. This same information must be provided if the work for this contract will be performed at any other location(s). List all locations where work is to be performed and indicate whether such facility is a division, affiliate, or subcontractor, and the percentage of work to be performed at each location.

c. Teaming/Organizational Structure (Attachment 1). If subcontractors or teaming partners are proposed, the offeror must complete Attachment 1 showing the government their teaming/organizational structure. The offeror will include the completed document in three areas of their proposal: Volume 1, Tab 2c, Volume II, Tab 12, and Volume III, Tab 4. Attachment 1 should be complete and clearly identify the company names and addresses of all teaming partners or subcontractors that will perform under this contract along with the percentage of projected assigned workload along with the performance locations for that teaming partner. Therefore, the offeror needs to provide the name of the teaming partner/subcontractor for each Product Service Code grouping listed. If more than one company will provide the Product Service Code, each Product Service Code. The offeror will ensure at least 50% of the cost of contract performance incurred for personnel shall be expended for employees/services provided by the concerned. The offeror must comply with all legal requirements, including but not limited to, FAR 52.219-14 – Limitations on Subcontracting, 13 CFR 124-510, 13 CFR 125.6, 15 USC 64.

**Tab 3 - Exceptions to Solicitation Requirements:** Offerors are required to meet all solicitation requirements, such as terms and conditions, representations and certifications, and technical requirements, in addition to those identified as evaluation subfactors. Failure to meet a requirement may result in an offer being ineligible for award. Offerors must clearly identify any exception to the solicitation terms and conditions and provide complete accompanying rationale. Each exception shall be specifically related to each paragraph and/or specific part of the solicitation to which the exception is taken. Provide rationale in support of the exception and fully explain its impact, if any, on the performance, schedule, cost, and specific requirements of the solicitation. This information shall be provided in the format and content of Table 2 below.

**Table 2 - Solicitation Exceptions**

Solicitation Document	Page/ Paragraph	Requirement/ Portion	Rationale
PWS, Part X, Pricing Template, Past Performance Tool	Applicable Page and Paragraph Numbers	Identify the requirement or portion to which exception is taken.	Describe Why the requirement can/will not be met.

**Tab 4 - Representations, Certifications (Tab 4):** Complete the necessary fill-ins and certifications in Sections D through K. Section K shall be returned in its entirety. For Sections D through I, the offeror shall submit only those pages that require a fill-in.

Mentor-Protégé Agreements and 8(a) Joint Venture Certifications. If the Offeror is part of Mentor-Protégé agreement or an 8(a) joint venture, the offeror shall provide a copy of the Small Business Administration (SBA) approved Mentor-Protégé agreement and/or Joint Venture certification documentation. For either Mentor-Protégé or 8(a) Joint Ventures, the SBA must receive the certification documentation prior to the proposal due date and the Government must receive the SBA-approved documentation before the date of notice or announcement of award of any contract. If the Government does not receive the SBA-approved documentation of the Mentor-Protégé or 8(a) Joint Venture agreement as of notice or announcement of award of any contract, the Mentor-Protégé offeror shall be eliminated from the competition. The Government will not delay contract award waiting for SBA approval.

**Tab 5 - Letter of Credit:** Offerors must include a Letter of Credit to demonstrate the offeror's financial health and capacity to cover startup expenses for this requirement. The document, issued by a bank or other financial institution, shall provide the offeror a line of credit for a minimum of \$2 million. The Letter of Credit shall include contact information of the issuing organization and the Letter of Credit may be contingent upon award of this contract. The date of the letter can be issued anytime between release of the RFP and proposal due date. Offerors may submit a Letter of Credit with an initial expiration date to cover the entire performance period (5-years) or a letter with an initial expiration date that is a minimum period of one year from the date of issuance. If valid for the first year, the letter will be required to be renewed and provided to the contracting officer annually. The document, issued by a bank or other financial institution must include contact information for the issuing organization.

**Tab 6 - Master Table of Contents:** The Offeror shall provide a table of contents in the Contract Administration Volume that serves as an overall guide to what files are provided in electronic format, where they are located, file name and brief descriptions of the documents. The table of contents will not be evaluated.

**Tab 7 - Glossary of Abbreviations and Acronyms:** Include a glossary of abbreviations and acronyms used throughout the proposals (all 4 volumes).

### **3.2 VOLUME II – TECHNICAL CAPABILITY**

d. For purposes of this technical proposal evaluation the Offeror shall claim medical support services capability using the government template for the Technical Self-Scoring Worksheet. Offerors may not consolidate more than one Government or commercial contract or task order, (including FSS, GSA, BPAs) or option periods into a single file to claim higher point value. The Government considers task orders to be stand-alone contracts. See additional Supporting Documentation instructions below in Paragraph c. The Offeror shall complete the Technical Self Scoring Worksheet (Attachment 2) in the electronic format provided in this solicitation and provide the completed Excel file and all supporting documentation in Volume II. No other format will be considered. The offeror shall not alter or add rows, columns, or formulas in the worksheet. The worksheet titled "Self Scoring Sheet" has 143 rows divided into 4 Categories: Scope, Magnitude, Complexity and Applicability. Within the Categories, there are 11 Sections that assess capability where points will be assigned based on the requirement. There are locked/protected heading rows, point values and subtotals along with hidden formula rows. Within each section are various elements of importance to the Government. Offerors should consider their past experience as well as their teaming partners to attest to medical support services technical capabilities. Supporting documentation should be for medical support services. Offerors will be required to provide supporting documentation as proof of their technical capability for the sections and elements within those sections. Claimed capability may be for either the prime contractor (offeror) or teaming partner(s) as identified on the DHA MSS Instructions, Attachment 2, and Technical Self-Scoring Worksheet. For Scope, at least one claimed capability in each of the three (3) elements (Labor Category/Services Placement, Hard-to-Fill/High Turnover Positions and Healthcare Settings) shall be for the offeror. For Magnitude, all the claimed capabilities should be for the prime offeror. For Complexity, for Elements 5 (High Demand Performance Locations) and 6 (Hard-to-Fill Locations), at least one claimed capability must be for the prime offeror; for Elements 7 (Prime Contractor Experience) and 8 (Subcontractor Experience) the claimed capability should be for the prime offeror. For Applicability, Element 9 (Customer Base), at least one claimed capability should be for the prime offeror and Elements 10 (ID/IQ experience) and 11 (FFP Experience) should be for the prime offeror. Supporting documentation requirements is discussed in detail below.

The worksheet has Columns A through P:

Column A is the Section number assigned to that capability element.

Column B is the RFP reference.

Column C is the capability being assessed.

Columns D through G are the level of capability that can be chosen by the offeror.

Column H is a subtotal by row and Section [that populates automatically based on the Column D-G selection].

Column I shows the electronic file name to be used for that Section/Element supporting documentation (see Table 1). Files must be distinguishable by name so that they may be rapidly accessed by the evaluation team.

Columns J through P is a current point of contact for the supporting documentation/item who the government can contact to validate the claim of capability if necessary.

e. The Offeror shall follow the instructions listed below when filling out the rows of the worksheet. For convenience, the instructions are also included in a separate worksheet in the Technical Self Scoring Worksheet titled "Instructions." **Offerors will place an "X" in the proper cell; no other character or word will work in the cell to generate the correlating point value.** Offerors shall not enter a point value as the worksheet will assign a point value based on the selected capability (column). It is important to note the government considers a task order under MAC ID/IQ contracts, including federal support schedule, GSA or BPA orders) a single contract; thus a single supporting documentation requirement.

o Row 1: Enter Offeror name in Column C - Scope Category (Rows 2 to 45).

Rows 2-8, 10, 12, 14, 16: Heading Rows or hidden formula rows.

▪ Rows 9-18, Labor Category/Service Product Service Code Placement. Place an "X" in the appropriate Column D, E, F, or G associated with the **highest number of FTEs placed on a single contract or order in the last 5 years (from the release date of this solicitation).** **At least one claimed capability must be from the prime offeror:** Certified (Row 9, Section 1, Element a), Specialized/Technical (Row 11, Section 1, Element b), Administrative/Clerical (Row 13, Element c), and Other Medical Support FTEs (Row 15, Element d). If the offeror never placed those types of labor categories/services, leave blank and complete Other Labor Category/Service in Row 17, Element e. This element is for services not in the PSC listed in Element a through d above (see Part I, PWS, Paragraph 1.4 table). Offerors may complete Row 17, Element e if they have placed an "X" in the Columns for Certified (Row 9, Section 1, Element a), Specialized/Technical (Row 11 Section 1, Element b), Administrative/Clerical (Row 13, Element c), and Other Medical Support FTEs (Row 15, Element d). If claiming Row 17, offerors must complete Row 18, Column C to specify the labor category.

▪ Row 19 is the Labor Category/Services Placement subtotal that automatically populates in Column H based on the above selections.

▪ Rows 20-23, 25, 27, 29, 31 & 33: Heading rows or hidden formula rows.

▪ Rows 24-35, Hard to Fill/High Turnover Positions. Place an "X" in the appropriate Column D, E, F, or G associated with the **highest number of FTEs placed on a single contract or order in the last 5 years.** **At least one claimed capability must be from the prime offeror:** Referral Clerk (Row 24, Section 2, Element a), Medical Appointment Clerk (Row 26, Section 2, Element b), Medical Office Clerk (Row 28, Section 2, Element c), Medical Records Technician (Row 30, Section 2, Element d), Outpatient Medical Coder (Row 32, Section 2, Element e), Beneficiary Services Representative (aka, PEBLO) (Row 34, Section 2, Element f).

▪ Row 35 is the Hard to Fill/High Turnover Positions Subtotal that automatically populates in Column H based on the above selections.

▪ Rows 36-38, 40, 42 & 43 are heading rows and hidden formula rows.

▪ Rows 39-41, Healthcare Setting. Place an "X" in the appropriate Column D or E, associated with your capability and **experience for medical support services in two performance settings (place where services were performed).** **At least one claimed capability must be from the prime offeror:** Outpatient Clinic (Row 39,

Section 3, Element a) or Hospital (Row 41, Section 3, Element b). For this solicitation, an Outpatient Clinic is a standalone ambulatory care facility providing outpatient medical care. A hospital is a medical treatment facility capable of providing outpatient and inpatient services. Services performed outside an outpatient clinic or hospital (i.e., remote, corporate headquarters, etc.) would not be included here.

- Row 44 is the Setting Subtotal that automatically populates in Column H based on the above selections.
- Row 45 is the subtotal for the Scope Category. Validate that the points were correctly calculated and transfer properly to the Total Points Summary worksheet, Row 5, Column B.
- 
- Magnitude Category (Rows 46-61) – All claimed capabilities should be for the prime offeror. Offerors should select a single contract or order with the highest total value (including options) and provide up to 10 pages for supporting documentation. Next, prime offerors should support the total number of Medical Support Service FTEs placed for the Government in the last 5 years from the date of the solicitation and provide up to 40 pages for supporting documentation. Then, the prime offeror will total up all active contracts (only for the offeror) managed in the last 5 years from the date of the solicitation and provide up to 40 pages of supporting documentation.
- Rows 46-49, 50-55 & 59 are heading rows and hidden formula rows.
- Row 51, Highest total Value on a single contract or order as the prime offeror. Place an “X” in the appropriate Column D, E, F or G.
- Row 56, Total Medical Support Service FTEs placed for the Government in the last 5 years. Place an “X” in the appropriate Column D, E, F or G.
- Row 60, Total number of active contracts or orders providing medical support services to the Government as of the date of the solicitation. Place an “X” in the appropriate Column D, E, F or G.
- Row 61 is the subtotal for the Magnitude Category. Validate that the points were corrected calculated and transferred properly to the Total Points Summary worksheet, Row 6, Column B.
- Complexity Category (Rows 62-115).
  - Rows 62-66, 68, 70, 72, 74, 76, 78, 80, 82, 84 are heading rows or hidden formula rows.
  - Rows 67-85, High Demand Performance Locations. Place an “X” in Column D or E attesting to historic capability of providing Medical Support Services in the listed performance locations. At least one claimed capability must be from the prime offeror. Offerors may enter one “Other” location and are required to specify the location in Row 86.
  - Row 87 is the High Demand Performance Locations Subtotal that automatically populations in Column H based on the selections above.
  - Rows 88-91, 93, 95, 97, 99 are heading rows or hidden formula rows.
  - Rows 92-100, Hard to Fill Locations. Place an “X” in Column D or E attesting to your historic capability of providing Medical Support Services in the listed performance locations. At least one claimed capability must be from the prime offeror.
  - Row 101 is the Hard to Fill Locations Subtotal that automatically
  - Rows 102-105, 107 are heading rows or hidden formula rows
  - Rows 106-108, Prime Contractor Experience. Place an “X” in Column D or E attesting to the prime offeror’s performance capability as the Prime and subcontractor.
  - Row 109 is the Prime Contractor Experience Subtotal that automatically
  - Rows 110-113 are heading rows or hidden formula rows.
  - Row 114, Subcontractor/Team Management. Place an “X” in Column D or E attesting to the prime offeror’s historic capability of managing teaming partners/subcontractors.
  - Row 115 is the subtotal for the Complexity Category. Validate that the points were correctly calculated and transferred properly to the Total Points Summary worksheet, Row 7, Column B.
- Applicability Category (Rows 116-143).
  - Rows 116-120, 122-136, 138-141 are heading rows and hidden formula rows.
  - Rows 121-129, Customer Base. Place an “X” in Column D or E attesting to historic capability of providing Medical Support Services to the listed customers. At least one claimed capability must be from the prime offeror. For multiple MTFs involving different Services or multi-market sectors, the customer should be reported as DHA. If performance is at a single MTF, the customer would be based on what service owns that MTF. Offerors may claim one “Other” location in Row 129, but must complete Row 30, Column C to specify the customer.

- Row 137, Indefinite Delivery/Indefinite Quantity Contract Experience. Place an “X” in Column D or E attesting to the prime offeror’s historic capability of performing on an Indefinite Delivery/ Indefinite Quantity Contract.
- Row 142, Firm Fixed Price Contract Experience. Place an “X” in Column D or E attesting to the prime offeror’s historic capability of performing on a Firm Fixed Price Contract.
- Row 143 is the subtotal for the Applicability Category. Validate that the points were correctly calculated and transferred properly to the Total Points Summary worksheet, Row 8, Column B.

f. The Offeror shall provide supporting documentation for each section and element in the four (4) Categories of Scope, Magnitude, Complexity and Applicability when points are being granted in the Technical Self Scoring Worksheet. This documentation will be a scanned pdf file and will follow the required naming convention shown in Table 1. Offerors will highlight (by color or circling) the information in the document(s) that validate their claimed technical capability.

Offerors must provide a single file as supporting documentation. For example, Tab 1 has five (5) elements a through e. An offeror can provide documentation to support capability. Each element will be a separate pdf file. Offerors should use the naming convention: company name.VolIII.TAB1a, company name.VolIII.TAB1b, company name.VolIII.TAB1c, company name.VolIII.TAB1e, company name.VolIII.TAB1e,. If an offeror is NOT claiming capability on a particular element, they should not provide a file with that TAB name in their proposal. A single supporting document file may apply to more than one row on the Self-Scoring Technical Capability Worksheet as long as that document supports the claimed items. If an offeror uses the same contract to support multiple elements/section on the worksheet, offerors shall rescan and follow the naming convention for the item to ease retrieval and validation procedures.

The Offeror shall not consolidate requirements on multiple task/delivery orders to obtain a higher point value since contract or task order (including commercial, MAC ID/IQ, GSA, FSS or BPA orders) are considered a single contract under this solicitation. Thus, each contract, order or other binding business agreement will stand alone to support a claimed item and will be a separate supporting documentation file provided in the proposal. Likewise, the Offeror shall not consolidate requirements for different option periods on the same contract or order to obtain a higher point value as part of their supporting documentation. To illustrate, an offeror has two separate contracts (or task orders) where they provide a total of four (4) certified medical support FTEs. The offeror cannot combine them to total 8 FTEs to get the maximum points available on the Self Scoring Technical Worksheet [of 100 points]. The offeror could only claim 4 FTEs and provide one of those contracts as supporting documentation. If, on the other hand, the offeror provided all 8 FTEs under one contract or task order the offeror could claim all 8 FTEs and self-score at 100 points. The following supporting documentation is acceptable:

- For Government Contracts: Provide a signed copy of the SF 1449, SF33 or DD1155 along with other contract pages that show clearly detail the claimed item (labor category, FTE, location, dollar value, etc.).
- For Commercial Contracts: Provide a signed and dated letter from the customer that confirms the claimed element on the worksheet. A clear name, title, address and phone number for the customer must be on the letter.

Offerors are cautioned that the supporting documentation must demonstrate performance in the area claimed on the Technical Self-Scoring Worksheet (i.e., labor category, location, number of full-time equivalent [FTEs]. For example, if you are attesting to the government you provide 7+ FTEs in the Certified Medical Support Positions Product Service Code, the documentation provided must clearly show more than seven (7) positions on a single order or contract. The Government reserves the right to review any information related to the supporting documentation for validation only obtained by the government to aid in validating the technical capability. The supporting documentation must match the services of this solicitation.

### **3.3 VOLUME III – PAST PERFORMANCE**

Past performance tool (see Attachment 4 for data requirements on the past performance tool): The Offeror shall use the past performance information (PPI) tool for submitting up to eight (8) recent past performance references and contract information. This tool can be downloaded from FedBizOpps (<https://www.fbo.gov/>) as an attachment to this solicitation posting. The Offeror shall save each past performance reference from the past performance tool on

the submitted DVD-R. If the Offeror is unable to download the past performance information tool, contact the PKO for assistance. The Offeror must save the PPI database file using the following convention: Prime Contractor Name + RFP Number.accdb (e.g., XYZCompanyHT0014-17-R-0010.accdb). There are no page numbering, line spacing or font size restrictions on the PPI tool). No page limitation applies as it is dictated by the PPI tool. Offerors will not print and scan the information; the Government requires the database in its entirety.

A complete past performance reference consists of:

5. Past performance information sheet printed from PPI tool (Attachment 4)
6. Past Performance Questionnaire, if required (Attachment 5)
7. Consent letter, if required (Attachment 6)
8. Client authorization letter, if required (Attachment 7)

Past performance Questionnaire (if required) (Attachment 5): The Offeror is responsible for initiating Past Performance Questionnaire (PPQ) only if the past performance reference is not available in CPARS. The Offeror will forward the questionnaire to the primary customer point of contact (POC), with instructions to send the completed, signed questionnaire back to the Offeror. Offerors shall provide completed and signed questionnaires as part of the Past Performance Volume of their proposal.

Subcontractor/teaming partner consent letter (if required) (Attachment 6): Past performance information pertaining to a subcontractor cannot be disclosed to the prime Offeror without the subcontractor's consent. Provide with the proposal, a letter from all subcontractors that will perform major or critical aspects of the requirement, a letter consenting to the release of their past performance information to the Offeror.

Client authorization letter (if required) (Attachment 7): Each Offeror, teaming partner, and/or joint venture partner shall execute a Client Authorization Letter for commercial customers.

TAB 1 – References from Prime Offeror. At least three (3) references of the eight (8) maximum references must be for the Prime offeror. All required documents should be scanned into a pdf file in the above order and named ABC.VOLIII.TAB1A, 1B and 1C.

TAB 2 – References for Teaming Partner/Subcontractor. Offerors may submit up to five (5) references (of the eight (8) maximum) to ensure at least one for each proposed teaming partner/subcontractor. If more than five teaming partners/subcontractors are proposed, offerors are required to submit references for the teaming partners or subcontractors that will perform the highest percentage of work as identified in Attachment 1 of their proposal. All required documents should be scanned into a single pdf file in the above order and named ABC.VOLIII.TAB2A, 2B, 2C, 2D and 2E. If no teaming partners are proposed, up to eight (8) references will be for the offeror. The file naming convention can remain the same.

TAB 3 – Organization Change History. Many companies have acquired, been acquired by, or otherwise merged with other companies, and/or reorganized their divisions, business groups, or subsidiary companies or had name changes. In many cases, these changes have taken place during the time of performance for relevant past efforts or between the conclusion of recent past efforts and this source selection. To clarify any organizational changes, the Offeror shall provide a "roadmap" describing all such changes in the organization of the company. A pamphlet or other commercial document describing such reorganizations may suffice within the page limit identified in Table 1, Proposal Organization. As part of this explanation, show how these changes impact the relevance of any efforts the Offeror identified for past performance evaluation/performance confidence assessment.

TAB 4 - Teaming/Organizational Structure (Attachment 1). If subcontractors or teaming partners are proposed, the offeror must complete Attachment 1 showing the government their teaming/organizational structure. The offeror will include the completed document in three areas of their proposal: Volume 1, Tab 2c; Volume II, Tab 12 and Volume III, Tab 4. Attachment 1 should be complete and clearly identify the company names and addresses of all teaming partners or subcontractors that will perform under this contract along with the percentage of assigned workload for each company and which services the teaming partner will provide. Therefore, the offeror needs to provide the name of the teaming partner/subcontractor for each Product Service Code grouping listed. If more than one company will provide the service category, each service category. The plan will ensure at least 50% of the cost of contract performance incurred for personnel shall be expended for employees/services provided by the concerned.



The contractor's plan must demonstrate and describe compliance with all legal requirements, including but not limited to, FAR 52.219-14 – Limitations on Subcontracting, 13 CFR 124-510, 13 CFR 125.6, 15 USC 64.

### **3.4 VOLUME IV – PRICE**

3.4.1. Offerors shall use the government provided Pricing Template (Attachment 3) for their price volume. Offerors will provide a complete fully burdened hourly rate for 39 labor categories (Service Type I) only. Using the standard position descriptions at Part 8, Attachment 4 and the Pricing Performance Work Statement at Attachment 8, the estimated FTEs, projected billable hours and locations in the sample order in Worksheet 2 of the Pricing Template, offerors should develop a single fully burdened rate by labor category and a total evaluated price for evaluation. There are no Service Type II estimates requiring pricing in the template. Offerors are advised that not every labor category in the available position descriptions or each performance location are included in the sample order Pricing Template. The fully burdened rates should include all costs, including but not limited to, worker direct labor costs as well as any fringe benefits, overhead, general and administrative expenses, and/or profit.

This template will be used by the Pricing Evaluation Team during the source selection process. Instructions are provided below and also repeated in the spreadsheet. Offerors must complete the model as designed. No attempt to reformat or remove cells is authorized. Submission of pricing data needs to be complete and accurate. Leaving cells blank or entering "N/A" or zeros are not acceptable values for these cells and will adversely affect the formulas in the Excel file. Hourly rates should be rounded to the nearest-two decimal format (i.e., \$15.32). Failure to comply with these terms and conditions may result in the offeror being removed from consideration for incomplete data submission. Incomplete pricing may result in an offeror's proposal being deemed ineligible for award.

Problems encountered with the spreadsheet design that prevent accurate recording of price data shall be brought to the attention of the Contracting Officer immediately. The Government will not recreate electronic files, or in any way develop pricing tables for the offeror in order for electronic evaluation to occur.

The MSS Pricing Template contains four (4) worksheets:

Worksheet 1 - Instructions. Worksheet 2 - Projected FTE and billable hours for Svc Type#1. Worksheet 3 - Entry sheet for Svc Type#1 - fully burdened hourly rates. Worksheet 4 – Total Evaluated Price. Reference Part 8, Attachment 3 for potential performance locations and; Part 8, Attachment 4 for standard position descriptions.

Worksheet 2. Projected FTE for Svc Type#1 – provides projected FTEs by Labor Category and Performance Location annually (to be considered for each annual pricing.) No entry is done on this worksheet, but is the required information with total FTEs and billables hours (FTEs times 1920) by performance location and customer.

Worksheet 3. Svc Type#1 – Fully Burdened Hourly Rate Entry Sheet. To complete Worksheet 3 offerors are to look at each position description for education, experience and qualification requirements (Part 8, Attachment 4), the pricing Performance Work Statement (Instructions Attachment 8), as well as the projected FTEs by Labor Category and Performance Location in Worksheet 2. The Government calculated projected billable hours by taking the total FTE number times the 1920 productive hours in a standard man-year. Offerors shall consider this when developing a fully burdened hourly rate. Offerors shall enter a fully burdened hourly rates for the 42 Labor Categories for the 5-contract years in Rows 6 to 10, Columns B - AQ. The spreadsheet calculates a labor category subtotal for Year 1 through Year 5 in Rows 12 to 16, Columns B through AQ. Then, a total for all years adds Years 1, 2, 3, 4 and 5 together by labor category in Row 17. A total for Service Type I requirements is in Row 18, Column AR.

Worksheet 4. – Total Evaluated Price. No entry is required for Worksheet 4—only verification and validation of accuracy. This worksheet is pulling the Service Type#1 total from Worksheet 3, Row 18, Column AR. The total evaluated price used for evaluation adds Row 2, Column A to Column B to generate Column C. Offerors are urged to ensure their pricing is complete and accurate.

3.4.2 If needed, offerors will provide Price Assumptions at Tab 2 of the IV Price Volume. The document will be created by the offeror and will be included in this volume.

List of Attachments: The following list of attachments is provided at the end of this section:

1. Contractor Teaming/Organization Structure
2. Technical Self Scoring Worksheet (separate Excel File)
3. Pricing Template (separate Excel File)
4. Past Performance Tool
5. Past Performance Questionnaire
6. Subcontractor/Teaming Partner Consent Letter
7. Client Authorization Letter
8. Pricing Performance Work Statement (separate pdf file)

>END ADDENDUM to 52.212-1<

## ATTACHMENT 1

### Teaming/Organizational Structure ATTACHMENT 1: TEAM COMPOSITION WORKSHEET

1. Provide the required information on the offeror (Prime) below. If the offeror is a Joint Venture, list the name of the Joint Venture on the first line and provide the details for the two (2) companies forming the Joint Venture on the other two lines.

OFFEROR (Prime) COMPANY NAME	Small Business Designation	PSC Code	DUNS Number	ADDRESS	POC & TELEPHONE	PERCENTAGE OF CONTRACT WORKLOAD	Proposed Performance Location(s)* (list states)

*Note: Total prime workload must be greater than or equal to 50% of contract workload.*

2. Provide the requested information on all teaming partners/subcontractors. If more space is needed, use an additional copy of this sheet and number accordingly (i.e., Page 1 of 2).

Subcontractor's COMPANY NAME	Small Business Designation, if applicable	PSC Code	DUNS Number	ADDRESS	POC & TELEPHONE	PERCENTAGE OF CONTRACT WORKLOAD	Proposed Performance Location(s)* (list states)

*Note: Total teaming Partner/subcontractor workload must be less than or equal to 50% of contract workload.*

**\*This refers to states where the company will perform Medical Support Services under this solicitation.**

**ATTACHMENT 2**

**Technical Self-Scoring Worksheet**

**Provided separately in Excel format**

**ATTACHMENT 3**

**Pricing Template**

**Provided separately in Excel format**

## ATTACHMENT 4

### PAST PERFORMANCE INFORMATION (PPI) TOOL

Offerors must use the PPI Tool (Use latest version from FBO.gov) in order to electronically submit the PPI portion of the Past Performance Volume in accordance with the RFP.

#### Downloading the PPI Tool

The PPI Tool can be downloaded by performing the following steps (if you are unable to download the Tool, contact the contracting officer for assistance):

5. Access the FedBizOpps (<https://www.fbo.gov/>) website.
6. Find the solicitation posting.
7. Locate the “ppi tool” link [ppi tool.accdb](#) from the “All Files” column **ALL FILES** on the solicitation’s “Notice Details” tab **Notice Details**.
8. Select the link and save the “ppi tool” to your computer. Name the file as the prime contractor + RFP number + file extension (e.g. XYZCompanyHT001517R007.accdb).

**Note:** PPI Tools saved in Microsoft Office versions 2007 and greater will be saved with “.accdb” file extension.

#### Entering information in the PPI Tool

After selecting and saving the tool, enter information by performing the following steps:

18. Open the saved PPI Tool.
19. Select the “Options” button from the “Security Warning” banner, if

applicable.



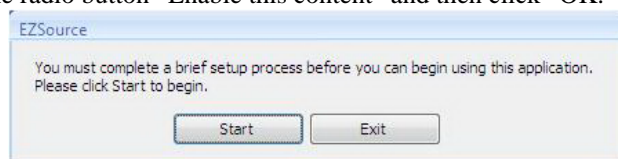
20. The “Security Alert” pop-up screen displays.



**Figure 1: Security Alert Pop-up**

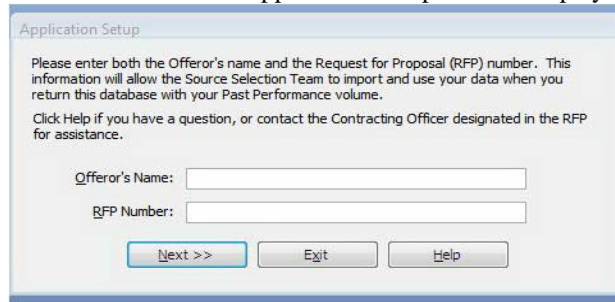
#### Note:

- Files saved using Microsoft Office 2010 will have the “Enable Content” button on the “Security Warning” banner and therefore will not get a Security Alert pop-up.
  - If a “read only” file is opened, in order to populate data in the file, click “Save As” in the “Read-Only” message bar. Enter the filename as the prime contractor + RFP number + file extension (e.g. XYZCompanyHT001517R0007.accdb).
21. Select the radio button “Enable this content” and then click “OK.” A setup pop-up screen displays.



**Figure 2: Setup Pop-Up**

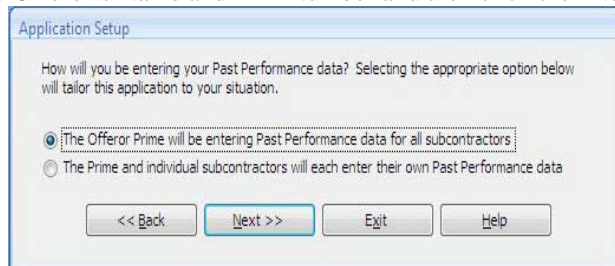
22. Select the “Start” button. The “Application Setup” screen displays.

The "Application Setup" window has a title bar with the text "Application Setup". Below the title bar, there is instructional text: "Please enter both the Offeror's name and the Request for Proposal (RFP) number. This information will allow the Source Selection Team to import and use your data when you return this database with your Past Performance volume. Click Help if you have a question, or contact the Contracting Officer designated in the RFP for assistance." Below this text are two input fields: "Offeror's Name:" and "RFP Number:". At the bottom of the window are three buttons: "Next >>", "Exit", and "Help".

**Figure 3: Application Setup Screen**

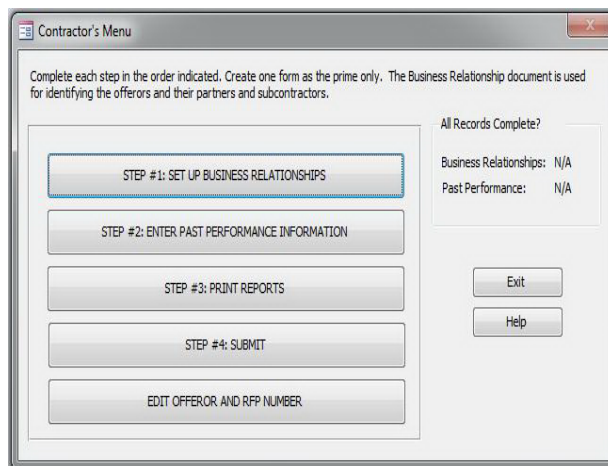
Note: Once the Offeror's Name and RFP Number have been entered they can be edited by selecting the “Edit Offeror And RFP Number” button from the “Contractor's Menu”

23. Enter the Offeror's Name and RFP Number and then click the “Next” button. The application setup continues.

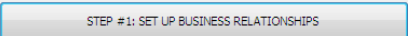
The "Continue the Application Setup" window has a title bar with the text "Application Setup". Below the title bar, there is instructional text: "How will you be entering your Past Performance data? Selecting the appropriate option below will tailor this application to your situation." Below this text are two radio button options: "The Offeror Prime will be entering Past Performance data for all subcontractors" (which is selected) and "The Prime and individual subcontractors will each enter their own Past Performance data". At the bottom of the window are four buttons: "<< Back", "Next >>", "Exit", and "Help".

**Figure 4: Continue the Application Setup**

24. Choose the appropriate option by selecting the corresponding radio button and then click the “Next” button. The “Contractor's Menu” displays.

The "Contractor's Menu" window has a title bar with the text "Contractor's Menu". Below the title bar, there is instructional text: "Complete each step in the order indicated. Create one form as the prime only. The Business Relationship document is used for identifying the offerors and their partners and subcontractors." Below this text is a list of five buttons: "STEP #1: SET UP BUSINESS RELATIONSHIPS", "STEP #2: ENTER PAST PERFORMANCE INFORMATION", "STEP #3: PRINT REPORTS", "STEP #4: SUBMIT", and "EDIT OFFEROR AND RFP NUMBER". To the right of this list is a section titled "All Records Complete?" with two lines of text: "Business Relationships: N/A" and "Past Performance: N/A". At the bottom right of the window are two buttons: "Exit" and "Help".

**Figure 5: Contractor's Menu**

25. Click the “Step 1: Set up Business Relationships” button  to create a business relationship, if applicable, for each business entity before proceeding throughout the PPI Tool (refer to Section L of the RFP for detailed instructions). Identify all prime and sub-prime organizations identified in Attachment 4, Contractor Team Organization and categorize them according to the appropriate role in the proposed acquisition. The “Business Relationships” screen displays.

**Figure 6: Business Relationships**

26. Click the “New” button to create a business relationship for the proposed acquisition. An additional “Business Relationships” screen displays.

**Figure 7: Enter New Business Relationship**

27. Complete the fields as follows (fields marked on the screen with an asterisk ‘\*’ are required):
- Contractor’s Name: Self-explanatory
  - Role in Proposed Acquisition: Choose one of the four options – Prime, Sub, Joint Venture, or Other (Explain). An explanation comment box will display when you select “Other.”
  - Place of Work: Location where contractor will perform work.
  - Percentage of Work: Identify percentage of work contributed by specified business entity
  - Responsibilities: Detail proposed responsibilities of specified business entity.

28. Select one of the buttons at the bottom of the screen.

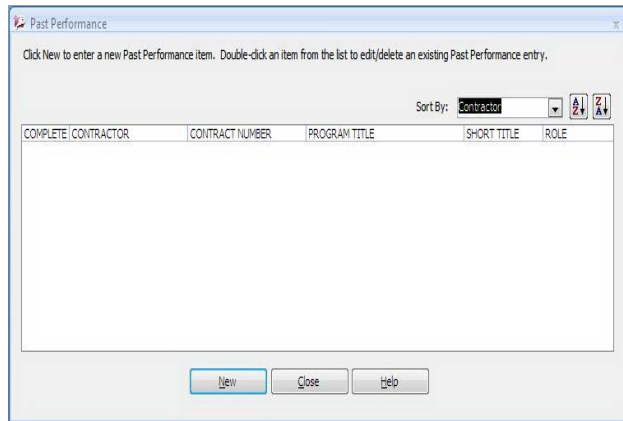
- Add – Saves the current business relationship and allows for the addition of a new one.
- Close – Cancels the current business relationship without saving.

**Note:** In order to edit or delete an existing business relationship in the list, double-click on it.

29. Select the “Close” button on the “Business Relationships” screen after all of the business relationships has been added.

30. Click the “Step 2: Enter Past Performance Information (PPI)” button  to enter the Past Performance Information. The “Past Performance” screen displays.





**Figure 8: Past Performance**

31. Click the “New” button to enter Past Performance Information for the proposed acquisition. An additional “Past Performance” screen displays.

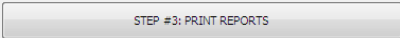
**Figure 9: Enter Past Performance Information**

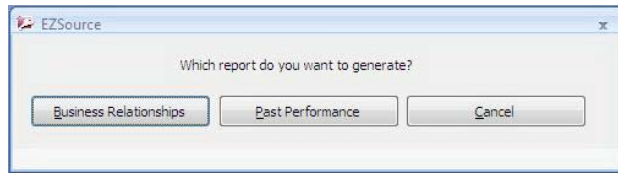
32. Complete the fields on each of the tabs as follows (fields on the screen marked with an asterisk ‘\*’ are required):
- **Contract Information Tab**
    - ❖ **Contractor:** Select from the dropdown the appropriate business entity.
    - ❖ **Cage Code:** Self-explanatory.
    - ❖ **Contract Number.**
    - ❖ **Program Title:** Enter full name of program.
    - ❖ **Contr Agency/Customer:** Enter servicing contracting agency and customer (office symbols suffice).
    - ❖ **DUNS Number:** Self-explanatory
    - ❖ **Delivery Task/Order:** If the order is provided as a stand-alone reference, enter the task/call/delivery/purchase order number.
    - ❖ **Contract Type:** Enter Firm-Fixed-Price (FFP), Cost Plus Fixed-Fee (CPFF), Indefinite Delivery/Indefinite Quantity (ID/IQ), LH, Blanket Purchase Agreement (BPA), Cost Plus Incentive-Fee (CPIF), Cost Plus Award Fee (CPAF), etc. For additional clarification, click the question mark button.
    - ❖ **Short Program Title (i.e. Acronym):** Enter abbreviated title for the program or enter “N/A.”
    - ❖ **Contract Dollar Value:**
      - **Original:** Input total contract dollar value, with all options if applicable, in the amount originally awarded on the referenced contract.
        - If ID/IQ or BPA, provide total ceiling.
        - If stand-alone task/call/delivery/purchase, provide amount of the individual contract.

- Current: Input total contract dollar value, with all options if applicable, as the contract stands at time of PPI submission.
    - If ID/IQ or BPA, provide total ceiling.
    - If stand-alone task/call/delivery/purchase, provide amount of the individual contract.
  - Explain the differences in Contract Value, if applicable: Enter an explanation of the difference between the original contract dollar value and the revised value as of the time of PPI submission.
- ❖ Period of Performance (mm/dd/yy)
- Start Date: Input start date of contract.
  - Original End Date: Input original end date based on award.
  - Current End Date: Input end date, as the contract stands at time of PPI submission.
  - Explain the differences in Period of Performance, if applicable: Enter an explanation of the difference between “Original End Date” and “Current End Date.”
- Program Details Tab
- ❖ Brief Description of Effort as:
- Select Prime, Sub, Joint Venture, or Other (Explain). An explanation comment box will display when you select “Other.”
  - Provide a brief description of the service provided and actual work performed under this contract reference.
  - \*\*\*\*If applicable: Provide information on performance problems encountered on the identified contracts. At a minimum, briefly describe the problem experienced, actions taken to alleviate the problem, and whether or not the problem was satisfactorily overcome.\*\*\*\*
- ❖ Explain how your performance on this contract is relevant for each market segment as described in Table 4 from Section 52.212-2 of the RFP. Include any unique aspects that demonstrate relevancy in this effort.
- POC & Key Individuals Tab
- ❖ Key Individuals: Not required.
- ❖ Customer Points of Contact: Click the “Program Manager,” “Contracting Officer” or “Admin POC” button for the point of contact that you would like to add, edit, or delete.  
**Note:** For government contracts provide current information on Program Manager, Contracting Officer, and Admin POC, if available.  
 For commercial contracts provide points of contact fulfilling these same roles, if available.
33. Select from the buttons at the bottom of the Past Performance screen:
- Save – Saves the Past Performance Information and displays the “Contract Information” tab on the Past Performance screen.
  - Close – Closes the Past Performance screen. If there were any updates, a pop-up window displays asking to save before closing.
  - Delete – Deletes the current PPI record. A pop-up window displays, select “Yes” to delete the record or “No” to close the window without deleting the record.
- Note:** In order to edit or delete an existing PPI record in the list, double-click on it.
34. Select the “Close” button on the “Past Performance Information” screen after all of the PPI records have been added.

### Printing Reports and Submitting PPI Tool

The Offeror may either print PPI references to be saved on a DVD or save the PPI references as listed below: In order to print the Business Relationships and PPI reports, perform the following steps:

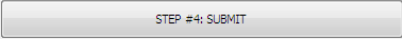
2. Click the “Step 3: Print Report” button . A pop-up displays asking which report to print.

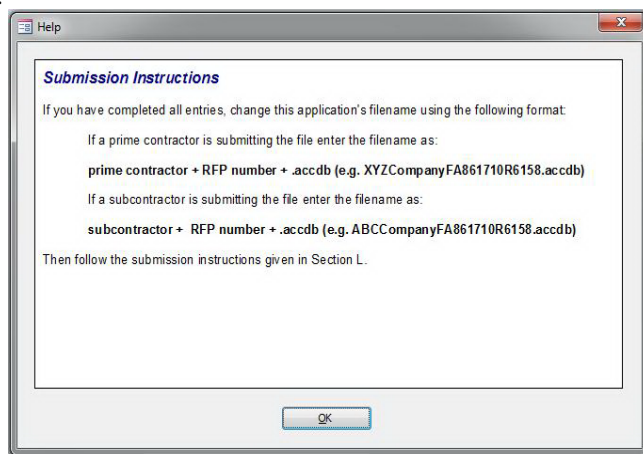


**Figure 10: Select Report to Print**

5. Select separately each of the two options, "Business Relationships" or "Past Performance." The Business Relationships and Past Performance documents will print separately. Hard copies of the pages generated from this tool shall be saved in a pdf format as outlined in this RFP for the Past Performance Volume folder on the DVD.

In order to save the Business Relationships and PPI, perform the following steps:

6. Click the "Step 4: Submit" button . The "Submission Instructions" screen displays.



**Figure 11: Submission Instructions**

7. Follow the submission instructions.

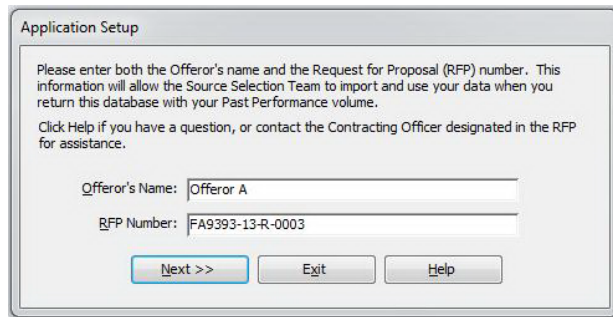
**Note:**

- Submit an electronic copy (e.g. DVD) of the saved PPI database file with your proposal. Submitting the file name as follows:
  - Contractor name + Volume number + Tab number (e.g. XYZCompanyVOLIIITAB1A.acddb)
- Once the file is saved to a DVD or any location that is marked as "Read-only," it must first be saved to the desktop in order to read/edit the file.

**Editing Offeror and RFP Number**

In order to edit the Offeror name and/or the RFP number identified during start-up, perform the following steps:

4. Click the "Edit Offeror and RFP Number" button . The "Application Setup" screen displays.



The image shows a software dialog box titled "Application Setup". It contains instructional text about entering offeror and RFP information, input fields for "Offeror's Name" and "RFP Number", and three buttons: "Next >>", "Exit", and "Help".

**Application Setup**

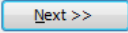
Please enter both the Offeror's name and the Request for Proposal (RFP) number. This information will allow the Source Selection Team to import and use your data when you return this database with your Past Performance volume.

Click Help if you have a question, or contact the Contracting Officer designated in the RFP for assistance.

Offeror's Name:

RFP Number:

**Figure 12: Change Name and RFP Number - Application Setup**

5. Update the Offeror's name and/or RFP number.
6. Click the "Next" button  twice to return to the "Contractor's Menu".

**ATTACHMENT 5**  
**Past Performance Questionnaire**

**Medical Support Services Past Performance Questionnaire**

**Page 1 of 7**

*WHEN FILLED IN, THIS DOCUMENT IS SOURCE SELECTION SENSITIVE INFORMATION  
IAW FAR 2.101 AND 3.104*

**Offeror:** Complete SECTION 1, and send a questionnaire to the customer point of contact (POC) listed on the Past Performance Information Sheet for the contract. The primary customer is considered the individual most familiar with the contractor's performance of services at the duty location (end user). Only request a questionnaire if there is no official CPARS available for your contract/performance effort.

**Primary Customer POC:** Complete SECTIONS 2-5 and sign/date questionnaire. Questionnaires should be returned to the company for inclusion into their Volume III – Past Performance proposal. Handwritten responses are sufficient.

**SOLICITATION NUMBER:** HT0014-17-R-xxxx **OFFEROR:** \_\_\_\_\_

**SECTION 1: REFERENCE IDENTIFICATION**

A. Contractor			
B. Contractor Performed as	Prime Contractor	Subcontractor	
	Other (specify) _____		
Teaming Structure/Key Partners			
C. Contract Number <i>(IAW M.6.2.4, single Reference for MAC, task orders, option periods; GSS or GSA are separate references)</i>			
D. Contract Type			
E. Was this a competitive contract?	Yes		No

F. Period(s) of Performance <i>(list all option periods, if applicable)</i>	
G. Initial Contract Award Amount Total (\$)	
H. Current/Final Contract Cost Total (\$)	
I. Reasons for differences between initial and final contract costs <i>(enter below):</i>	

J. Description of service provided *(enter below):*

**SECTION 2: CUSTOMER OR AGENCY IDENTIFICATION (Page 2 of 7)**

A. Customer or Agency Name	
B. Customer or Agency Description (i.e., hospital)	

C. Geographic Performance Location under this contract, (i.e., local, nationwide, worldwide, other Command). List States where services were provided below:			
<b>D. Provide number of full-time or part-time equivalent positions that were provided by the contract.</b>			
<b>List Individual Positions</b> (fill out ONLY if providing personnel to a client)	<b>FTEs</b>	<b>PTEs</b>	<b>N/A</b>

Clerical labor categories (i.e., secretary, appointment clerk, office clerk)			
Certified labor categories (i.e., medical coding professionals, transcriptionists, records technicians)			
Specialized labor categories (i.e., beneficiary services/PEBLO, tumor registrars, referral management personnel, utilization managers, third party collection clerks)			
Technical labor categories (i.e., logistics, supply, equipment technicians, public health, safety specialists)			
Other labor categories (list them below)			
<b>Full Operational Activities</b> (fill out ONLY if contractor perform an entire service i.e., staffing, operational planning, personnel management, reporting & corrective actions).	<b>FTEs</b>	<b>PTEs</b>	<b>N/A</b>
Patient Appointing Service			
Medical Records Service			
Medical Coding & Auditing Service			
Medical Transcription Service			
Referral Management Service			

### SECTION 3: EVALUATOR IDENTIFICATION (Page 3 of 7)

A. Evaluator's Name			
B. Evaluator's Title			
C. Evaluator's Phone/Fax Number			
D. Evaluator's Mailing Address			
E. Number of years evaluator worked on subject contract			

### SECTION 4: EVALUATION

Please confirm that your evaluation is consistent with the description of service provided in Section 1, Paragraph J on Page 1 of the survey. Indicate compliance of the contractor's performance by placing an "X" in either YES or NO blocks. Indicate your satisfaction is the overall evaluation using the scale provided below:

CODE	PERFORMANCE LEVEL
<b>E</b>	<b>EXCEPTIONAL</b> – The contractor's performance meets contractual requirements and consistently exceeds many. Very few, if any, minor problems were encountered. Contractor took immediate and effective corrective action.
<b>V</b>	<b>VERY GOOD</b> – The contractor's performance meets contractual requirements and consistently exceeds some. Some minor problems encountered. Contractor took effective and timely corrective action.
<b>S</b>	<b>SATISFACTORY</b> – The contractor's performance meets contractual requirements. For any problems encountered, the contractor took effective and timely corrective action.

<b>M</b>	<b>MARGINAL</b> – The contractor’s performance does not meet some contractual requirements. For problems encountered, corrective action appeared only marginally effective, not effective or not fully implemented. Customer involvement was required.											
<b>U</b>	<b>UNSATISFACTORY</b> – The contractor’s performance does not meet most contract requirements. Serious problem(s) encountered. Corrected actions were either ineffective or non-existent. Extensive customer oversight and involvement was required.											
<b>N</b>	<b>NOT APPLICABLE</b> – Unable to provide a rating. Contract did not include performance aspect.											
<b>Business Plan</b>							<b>YES</b>	<b>NO</b>	<b>N/A</b>			
Demonstrated the ability and willingness to perform requirements for the customer.												
Effectively integrated business practices over geographic range and scope of requirements.												
Managed teaming partners/subcontractors on this contract.												
Implemented sound strategies and contingency plans to safeguard service delivery.												
<b>Business Plan rating for business approach and teaming structure. (CIRCLE ONE)</b>							<b>E</b>	<b>V</b>	<b>S</b>	<b>M</b>	<b>U</b>	<b>N</b>
<b>SECTION 4: EVALUATION (continued) (Page 5 of 7)</b>												
<b>HUMAN RESOURCE MANAGEMENT PLAN</b>							<b>YES</b>	<b>NO</b>	<b>N/A</b>			
Demonstrated a strong recruiting methodology, market knowledge and personnel selection process.												
Demonstrated ability to hire and place fully qualified personnel (meeting all education, experience, as well as health and certification requirements) within contracted timeframes.												
Demonstrated ability to replace personnel due to planned/unplanned absences or vacancies within the contracted timeframes.												
Demonstrated ability to provide personnel that comply with DoD security requirements and are educated about the military healthcare system.												
Demonstrated ability to provide trained personnel on DoD computer systems (CHCS/AHLTA), and position requirements.												
Managed a qualified workforce and demonstrated day-to-day employee oversight and corporate requirements such as absenteeism, time and attendance, continued education, and appraisals.												
<b>Human Resource Management rating for recruiting, training, qualifying and personnel management. (CIRCLE ONE)</b>							<b>E</b>	<b>V</b>	<b>S</b>	<b>M</b>	<b>U</b>	<b>N</b>
<b>Performance Management Plan</b>							<b>Yes</b>	<b>No</b>	<b>N/A</b>			
Assess employee performance to ensure compliance with performance standards.												
Demonstrated a customer satisfaction process and an ability to resolve issues or complaints in a timely manner.												
Demonstrated the ability to maintain a stable workforce with minimal turnover of personnel and an overall fill rate of at least 95% annually.												
Complied with contract terms and conditions specific to contract bid rates.												
Monitored and reported performance measures; provided contract deliverables on time.												
<b>Performance Management rating for delivery of quality services, customer satisfaction, maintaining a stable workforce, compliance with price thresholds and monitoring and report activities. (CIRCLE ONE)</b>							<b>E</b>	<b>V</b>	<b>S</b>	<b>M</b>	<b>U</b>	<b>N</b>
<b>Overall contract performance rating. (CIRCLE ONE)</b>												
<b>Exceptional</b>		<b>Very Good</b>		<b>Satisfactory</b>		<b>Marginal</b>	<b>Unsatisfactory</b>		<b>N/A</b>			
<b>SECTION 4: EVALUATION (continued) (Page 6 of 7)</b>												
Please discuss each response for any question or rating which you indicated Marginal, Unsatisfactory or Not Applicable in response to the questions above (use additional sheets, if necessary).												
<b>Government Contracts Only:</b> Has/was this contract been partially or completely terminated for default,												

convenience, or are there any pending terminations?									
Yes		No		Default		Convenience		Pending Terminations	
If yes, please explain below (e.g., inability to meet cost, performance, or delivery schedules, etc).									
<b>SECTION 5: NARRATIVE SUMMARY (Page 7 of 7)</b>									
What were the contractor's greatest strengths in the performance of the contract?									
What were the contractor's greatest weaknesses in the performance of the contract?									
Would you have any reservations about soliciting this contractor in the future or having them perform one of your critical and demanding programs?									
Please provide any additional comments concerning this contractor's performance, as desired. Use a separate sheet if necessary.									
Evaluator's Printed Name/Title									
Evaluator's Signature/Date									



**ATTACHMENT 6**  
**Subcontractor/Teaming Partner Consent Letter**

Note: Past performance information concerning subcontractors and teaming partners cannot be disclosed to a private party without the subcontractor's or teaming partner's consent. Because a prime Contractor is a private party, the Government will need that consent before disclosing subcontractor/teaming partner past and present performance information to the prime Contractor during exchanges. In an effort to assist the Government's Performance Confidence Assessment Group (PCAG) in assessing your past performance relevancy and confidence, we request that a consent letter (similar to the sample below) be completed by the major subcontractors/teaming partners identified in Contractor Teaming/Organization Structure (Attachment 1), in your proposal. The completed consent letters should be submitted as part of your Past Performance Volume.

SAMPLE

Dear "Contracting Officer:"

We are participating as a (subcontractor/teaming partner) with (prime Contractor or name of entity providing proposal) in responding to the Defense Health Agency, Request for Proposal for a Medical Support Services (MSS) contract.

We understand that the Government is placing increased emphasis on past performance in order to obtain best value in source selections. In order to facilitate the performance confidence assessment process we are signing this consent letter to allow you to discuss our past and present performance information with the prime Contractor during the source selection process.

\_\_\_\_\_  
\_\_\_\_\_

(Signature and title of individual who has the authority to sign for and legally bind the company)

Company Name:

Address:

Telephone Number:

## ATTACHMENT 7

### Client Authorization Letter

Note: Past performance information concerning private sector Contractors, subcontractors and joint venture partners cannot be disclosed to the government without their consent. Client authorization letters are required for each identified effort of a commercial customer. This letter will authorize release to the Government of requested information on the Offeror's performance. The government will need that consent before contacting commercial customers to assess the Offeror's past performance. In an effort to assist the Government's Performance Confidence Assessment Group (PCAG) in assessing your past performance relevancy and confidence, we request that a client authorization letter (similar to sample below) be completed for any commercial customers identified in your proposal. The completed client authorization letters should be submitted as part of your Past Performance Volume.

#### Sample

Dear "Client:"

We are responding to a Defense Health Agency Request for Proposal for a Medical Support Services (MSS) contract.

In their acquisitions, the Government is placing increased emphasis on past performance as a source selection factor. They are requiring those clients of entities responding to their solicitation to be identified, and their participation in the evaluation process is requested. In the event that you are contacted for information on work performed, you are hereby authorized to respond to those inquiries.

We have identified Mr./Ms. \_\_\_\_\_ of your organization as the point of contact based on his/her knowledge of our work. Your cooperation is appreciated. Any questions may be directed to *[Add Company Name, Address, and Telephone Number]*

Sincerely,

**ATTACHMENT 8**

**Pricing Performance Work Statement**

(Provided separately in pdf format)

(End of Summary of Changes)